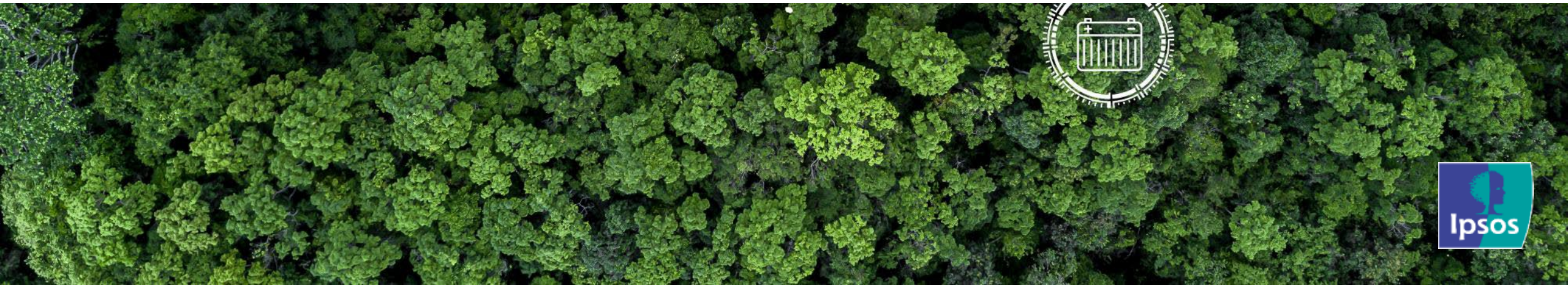
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MOBILITY AND FLEET BAROMETER 2024



Ipsos

2024 MOBILITY AND FLEET BAROMETER

01
Context and methodology p3

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03
What are the main characteristics of the fleets? p17

04
How are companies financing their fleet? p52

05
What changes are to be expected in the near future regarding energy mix? p61

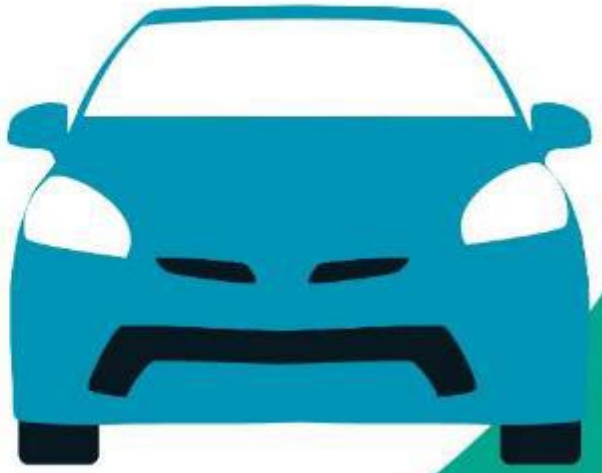
06
What are the perspectives in terms of mobility solutions ? p112

07
What are the usages in terms of connected vehicles, digital tools and road safety equipment? p145

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1

CONTEXT AND METHODOLOGY





KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERM SHIFTS ARE SHAPING THE MARKET?



2

WHAT KIND OF VEHICLES WILL THE MARKET EXPECT IN 3 YEARS?



3

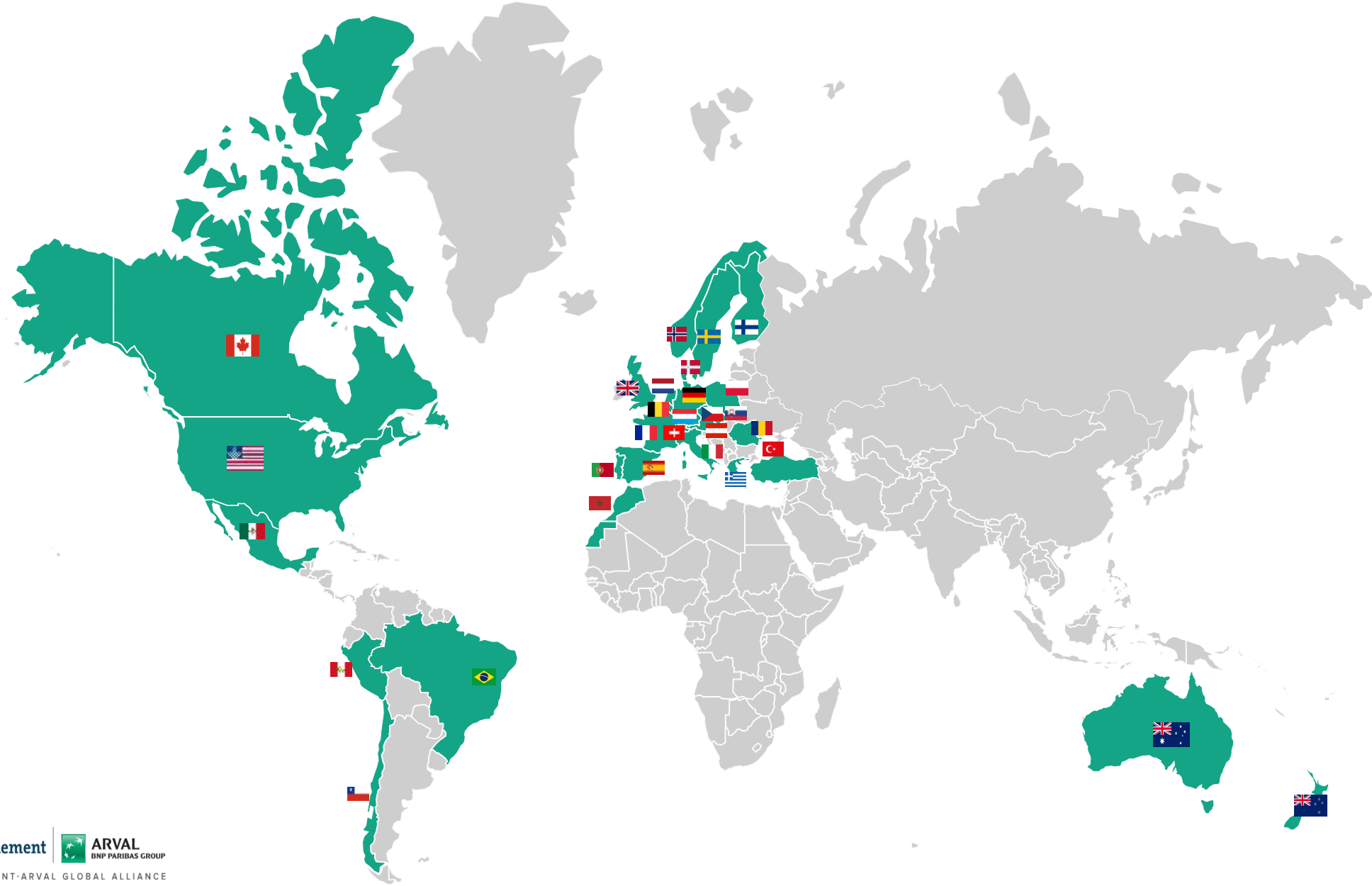
HOW DO MOBILITY SOLUTIONS IMPACT FLEET MANAGEMENT?

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SCOPE OF THE SURVEY : 30 COUNTRIES



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COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE | OUT OF EUROPE

	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ
Less than 10 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
10 - 99 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
100 - 249 empl.	●					●					●				●		●	●	●	●	●	●		●	●			●	●	●
100 - 499 empl.		●		●				●		●		●	●	●		●							●				●			
100 - 999 empl.			●		●		●		●																	●				
250 empl. or more	●					●					●				●		●	●	●	●	●	●		●	●			●	●	●
500 empl. or more		●		●				●		●		●	●	●		●							●				●			
1000 empl. or more			●		●		●		●																	●				

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METHODOLOGY








DATA COLLECTION METHOD	FIELDWORK PERIOD	TARGET	QUOTAS	SAMPLE	DURATION OF INTERVIEW
CATI SYSTEM (Computer Assisted Telephone Interviewing) Recruitment by telephone	SEPT 04 → NOV 10	COMPANY FLEET DECISION MAKERS in companies of all industries using at least 1 CORPORATE VEHICLE	COMPANY SIZE & SECTOR	5854 Europe 1650 Americas 1101 Rest of the world (TR,MA,AU,NZ) **8605** Interviews in total	**26** minutes on average

READING NOTES ABOUT THE REPORT

In this report, when a significant difference vs last year is observed (95% statistic confidence level),a reminder of last year figure is shown with the following symbol:

- ↗ XX — Significantly higher than 2023 year
- XX — Significantly higher than 2022 year
- XX = score 2023 or 2022
- ↘ XX — Significantly lower than 2023 year
- ▼ XX — Significantly lower than 2022 year
- XX = score 2023 or 2022

Some graphics may not be perfectly equal to 100%.
It is due to roundings.

NETs are groups of similar answers combined in the stub (ex. NET Interested = very interested + somewhat interested)/

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NUMBER OF INTERVIEWS CONDUCTED IN USA

Perimeter of the survey: companies owning at least 1 vehicle

Companies with Less than 10 empl.
99 INTERVIEWS

Companies with 10 - 99 empl.
65 INTERVIEWS

Companies with 100 - 999 empl.
80 INTERVIEWS

Companies with 1000 empl. or more
56 INTERVIEWS

1 to 99 employees
164 INTERVIEWS

100 employees and more
136 INTERVIEWS

SAMPLE STRUCTURE IN USA

Company size & sector

In %

					TOTAL
Construction Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors	9	11	9	8	9
Industry Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc…)	5	10	7	13	8
Services Finance / transportation / Hotels, Rooming Houses, Camps, And Other Lodging Places / Personal Services / Business Services / Automotive Repair, Services, And Parking / Motion Pictures / Amusement And Recreation Services / Health Services / Legal Services / Social Services / Museums, Art Galleries, And Botanical And Zoological Gardens / Membership Organizations / Engineering, Accounting, Research, Management, And Related Services / Private Households	57	65	64	56	60
Trade Building Materials, Hardware, Garden Supply, And Mobile Home Dealers / General Merchandise Stores Food Stores / Automotive Dealers And Gasoline Service Stations / Apparel And Accessory Stores / Home Furniture, Furnishings, And Equipment Stores / Eating And Drinking Places / Miscellaneous / Retail / Wholesale trade	30	14	20	24	23
Weight of each company size segment	33	20	27	20	

This sample structure was set up in order to be roughly representative of the number of companies for each activity sector and size based on the number of employees as well as to allow comparisons between countries on a similar basis.
In the following slides, no additional weighting of the data are applied to company sizes or activity sectors segments.

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MOBILITY SOLUTIONS LIST AND DEFINITIONS



CORPORATE CAR SHARING:
where an employee can make a vehicle reservation via an external solution



BIKE (OR OTHER TWO WHEELS) SHARING / BIKE (OR OTHER TWO WHEELS) LEASING solution provided by the company



PUBLIC TRANSPORT



MOBILITY BUDGET predefined budget granted by the employer allowing employees to choose their mode of transport



AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



PRIVATE LEASE OR SALARY SACRIFICE (private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer)



A SHORT OR MID TERM RENTAL VEHICLE to provide transport for an employee



CAR OR CASH ALLOWANCE

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2

EXECUTIVE SUMMARY





INSIGHT 1: US COMPANIES ARE OPTIMISTIC ABOUT THE FUTURE OF THEIR FLEETS

#1

ONGOING CHALLENGES & CONCERNS DUE TO TIRES AND INSURANCE COSTS

- The overall picture in the USA is in line with the global benchmark: **fleet managers are confident about the size of their fleet**, which should remain stable or even increase for 9 out of 10 of them. Fleet sizes should even **increase in the next 3 years for 1 out of 3**, driven by the large companies.
- Fleets sizes growth expectations are still **driven by business development first,** far ahead of offering vehicles to employees with no company car eligibility and HR related needs (talent recruitment, employee retainment).
- **Vehicles possession length is stable** (6,0 years), slightly above the global average, and tends to be longer among the >100-employee companies. To date, only **1 out of 5 companies use second-hand vehicles** (quite below the global average) – passenger cars being somehow more concerned than light trucks. These are pool cars or tool cars for most of them.
- **Remote working has been introduced by 1 out of 4 companies** since the beginning of the Covid crisis. 1 out of 5 companies has changed or considers changing its mobility policy to take it in account, through the development of alternative mobility solutions or through a change in terms of mileage or models.
- **1 out of 4 companies have been impacted by the semi-conductor shortage**, whether on EVs or on ICE vehicles renewals – half of them have extended the life cycle of current vehicles or included additional vehicle manufacturers in addition to the ones previously used.
- In response to rising petrol and diesel prices, most companies did not set up any particular strategy. **Prices increases expectations are first related to tires, insurance premiums and maintenance**.
- **Fleet managers face diverse and numerous challenges**, mostly related to managing longer vehicles' delivery time, to implementing alternative fuel technologies and to inducing more responsible driving among employees.
- Receive technical and operational consultancy (e.g. best vehicle / fit out options) in respect of the light trucks fleet is important for 4 out of 10 companies – as much as technical and operational consultancy or financial and legislative advice.

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INSIGHT 2: LEASING IS THE MAIN FINANCING METHOD USED

#2

OPERATING LEASING GROWTH EXPECTED AMONG THE SMALLEST COMPANIES

- In the USA, **the main financing method used to date is leasing**, ahead of outright purchase. The picture is the same for passenger cars and for light trucks.
- **Operating leasing growth potential has decreased** since last year and is now below the global average. To note though, operating leasing growth potential is strongly **driven up by the <10-employee companies**.

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INSIGHT 3: ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES IS SOMEHOW LIMITED FOR PASSENGER CARS …

#3

… BUT STRONGER FOR LIGHT TRUCKS FLEETS

- In the USA, **alternative fuel technologies (PHEV, HEV or 100% BEV) for passenger cars are used by 3 companies out of 10** to date, below the global average. The adoption potential is also more limited in the USA than globally.
- Looking again at passenger cars, **100% BEV and HEV adoption levels are similar, PHEV being somehow distanced**. The picture is the same regardless of the company size. The reasons for adopting alternative fuel technologies for passenger cars are numerous, diverse and in line with the global benchmark overall. They are mainly **related to their lower environmental impact, to improving the company's image, and to the reduction in the fuel expenses**.
- **As for light trucks, the implementation of alternative fuel technologies (100% BEV and Fuel Cell) is rather strong in the USA**: 1 out of 4 companies are using them, quite above the global average. The adoption of these technologies **is even higher among the >1000-employee companies**. The fact their total cost of ownership is in line with or lower than petrol or diesel alternatives and improving the companies' image are the main drivers of the adoption of these alternatives.
- **The main barriers to the adoption of 100% BEV, whether for passenger cars or for light trucks are still the higher purchase price, the limited range of models and the lack of charging points** (even though 3 out of 10 plan to install some at their premises in the next year). Larger models ranges and TCO would be the main reasons to start ordering more 100% BEVs.
- Overall, **companies are more prepared to operate zero-emission vehicles in response to the Government ban on the sale of new petrol and diesel vehicles in 2030 for light trucks** than for passenger cars – these preparations remain at early stages in most cases anyhow. In the next 3 years, most corporate vehicles are still expected to be ICE motorized.
- Lastly, **less than 2 out of 6 companies are eligible to an ESG regulatory public reporting**. 4 more will be eligible in the next 2 years. In this perspective, employee mobility is highly important for 3 out of 10 companies among them.

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INSIGHT 4: A LOW LEVEL OF ADOPTION OF MOBILITY SOLUTIONS

#4

CORPORATE VEHICLES ARE ESSENTIAL TRANSPORT TOOLS

- **Mobility solutions have been adopted by 1 out of 4 companies** to date, quite below the global average. >100-employee companies are somehow less concerned.
- The **most adopted solutions are cash or car allowance and corporate car sharing, but to a still quite low extent**. They are all seen as add-ons to corporate vehicles, these being essential business transport tools for most companies.
- **Employees' mobility is perceived as a strategic factor for 1 company out of 4**, with no difference based on the size of the companies.
- At last, the **half of the US companies have policies in place for cars that are owned by employees but used on business**.

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INSIGHT 5: A STILL SOMEHOW LIMITED USAGE OF CONNECTED VEHICLES

#5

TELEMATICS DATA USAGE IS ALSO LIMITED

- **1 out of 3 companies has a fleet using connected vehicles**, below the global average. No major difference between passenger cars and light trucks.

- **Less than 1 out 5 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years (below the global average too). Only a few are currently using the data.

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3

WHAT ARE THE MAIN **CHARACTERISTICS OF THE FLEETS?**





US COMPANIES ARE OPTIMISTIC ABOUT THE FUTURE OF THEIR FLEETS, DESPITE ONGOING CHALLENGES AND CONCERNS DUE TO MAINTENANCE AND INSURANCE COST

1

In the USA, the overall picture is in line with the global benchmark: **fleet managers are confident about the size of their fleet**, which should remain stable or even increase for 9 out of 10 of them. **Fleet sizes should even increase in the next 3 years for 1 out of 3**, this increase being driven by the >1000-employee companies (43%). No difference between passenger cars and light trucks overall.
Business development remains the main driver of the flees sizes growth expectations (68%), far ahead of offering vehicles to employees with no company car eligibility and HR related needs (talent recruitment, employee retainment).

2

Vehicles possession length is stable (6,0 years), slightly above the global average (5,5 years), and tends to be longer among the >1000-employee companies (6,4 years). No major difference between passenger cars (SUVs are replaced somehow later than cars) and light trucks (no difference between pick-up trucks, medium trucks and heavy trucks).

3

To date, only **1 out of 5 companies use second-hand vehicles** (quite below the 43% global average) – passenger cars being somehow more concerned than light trucks. These are pool cars or tool cars for most of them.

4

1 out of 4 companies has introduced or increased remote working for their employees since the beginning of the Covid crisis. 1 out of 5 companies has changed or considers changing its mobility policy to take it in account, through the development of alternative mobility solutions or through a change in terms of mileage or models.
The semi-conductor shortage impacted 1 out of 4 companies, whether on EVs or on ICE vehicles renewals – half of them have extended the life cycle of current vehicles or included additional vehicle manufacturers in addition to the ones previously used.
No strategy has ben set up by most companies (68%) in response to rising petrol and diesel prices. **Prices increases anticipations are first related to tires (75%), maintenance (38%) and insurance premiums (72%).**
Fleet managers face diverse and numerous challenges, mostly related to managing longer vehicles' delivery time, to implementing alternative fuel technologies and to inducing more responsible driving among employees.

Receive technical and operational consultancy (e.g. best vehicle / fit out options) in respect of the light trucks fleet is important for 4 out of 10 companies – as much as technical and operational consultancy or financial and legislative advice.

FLEET PROFILE



MOBILITY POLICY ADAPTATION COINCIDING WITH REMOTE WORKING



18% changed the policy or consider changing

16% changed the policy or consider changing

FLEET POSSESSION LENGTH



6.0 years

5.5 years (5.6)





ANTICIPATED FLEET EVOLUTION

(% will increase or remain stable)

93%

91%

RESPONDENTS POSITION WITHIN THE COMPANY

In %

Passenger cars + Light trucks



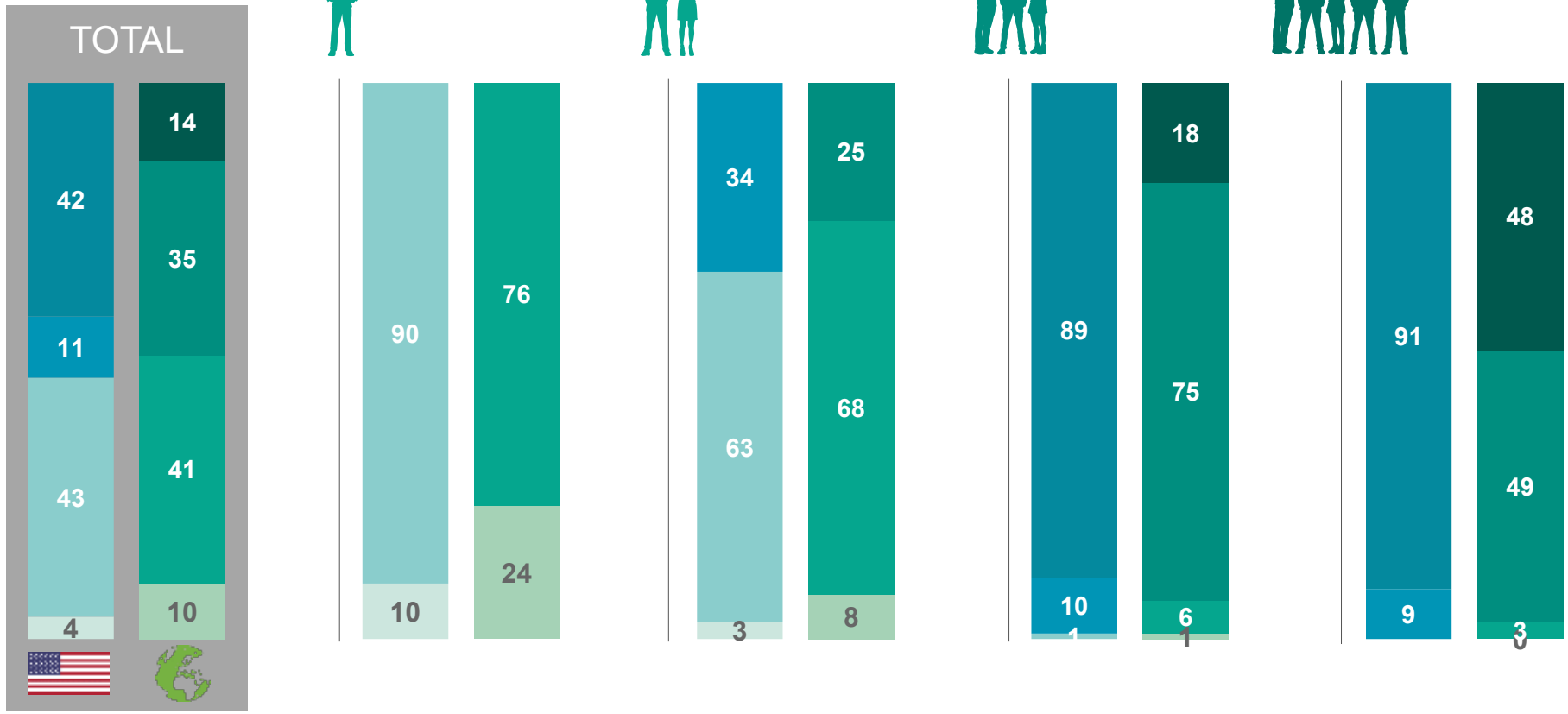
CEO / Managing director	18	27
Fleet director / manager	21	18
Procurement director / manager	14	12
Finance director / officer / manager / CFO	14	11
HR director/ manager	10	9
COO (Chief Operations Officer)	7	8
CSR director / officer / manager	6	6
Facility manager	6	5
Mobility manager	4	3
Other, please specify	0	2

Could you please specify your exact position in the company?
Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEET

In %

Passenger cars + Light trucks



Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES WITH AT LEAST ONE PASSENGER CAR OR ONE LIGHT TRUCK

(among companies with at least one vehicle in fleet)

In %

		TOTAL				
PASSENGER CARS		99	97	99	100	100
		98	97	98	100	100
VANS OR Light trucks		100	100	100	99	100
		99	98	97	99	99

And can you please tell us the total number of cars in your fleet? / And can you please tell us the total number of Light trucks or vans in your fleet?
Basis: companies with corporate vehicles = 100%

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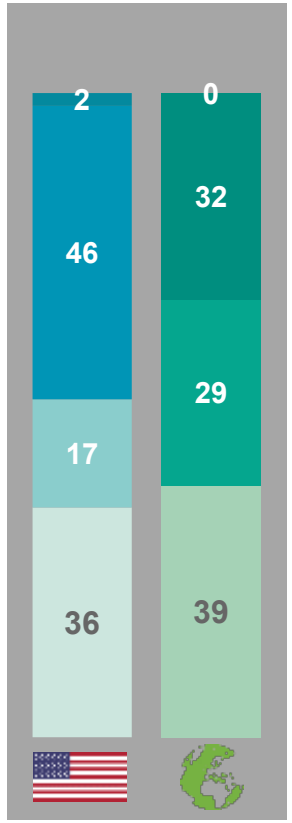
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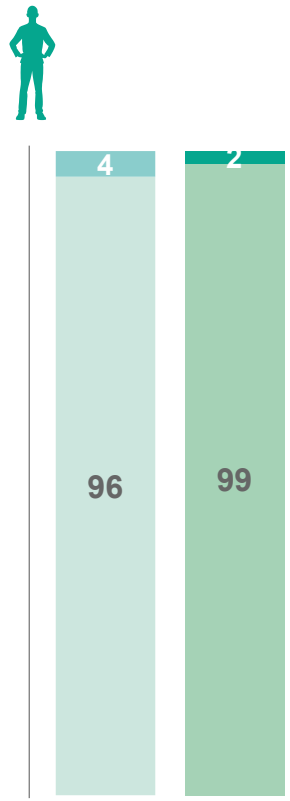
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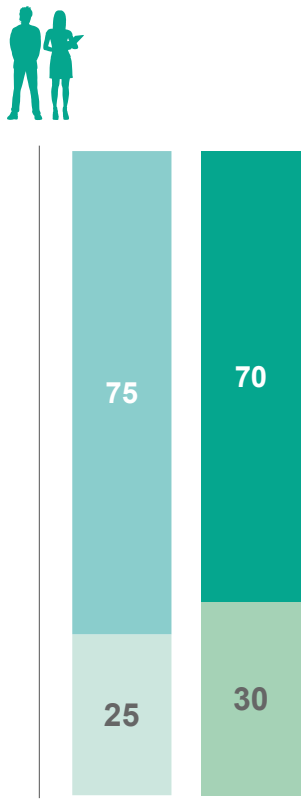
NUMBER OF PASSENGER CARS IN FLEET

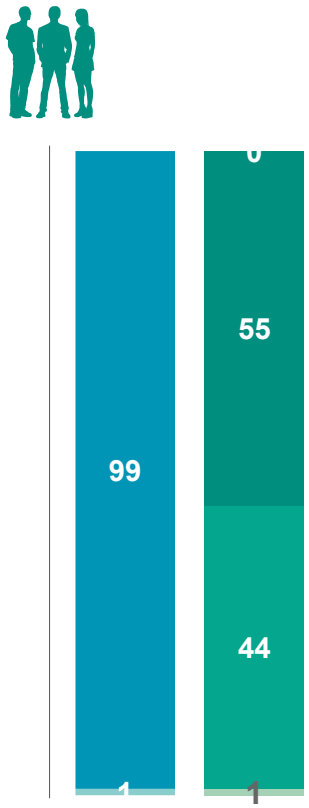
In %

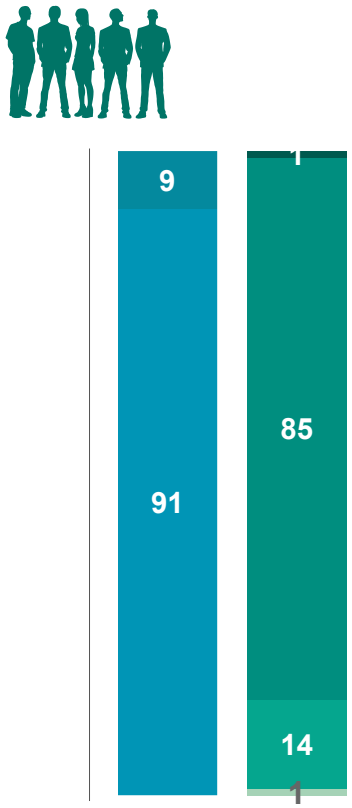
Passenger cars











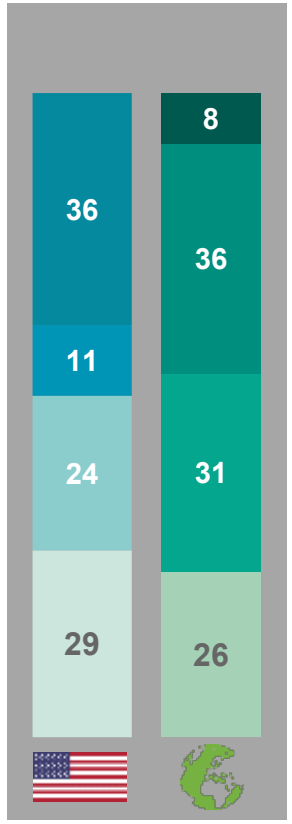
1000 vehicles and more
100 to 999 vehicles
10 to 99 vehicles
1 to 9 vehicles

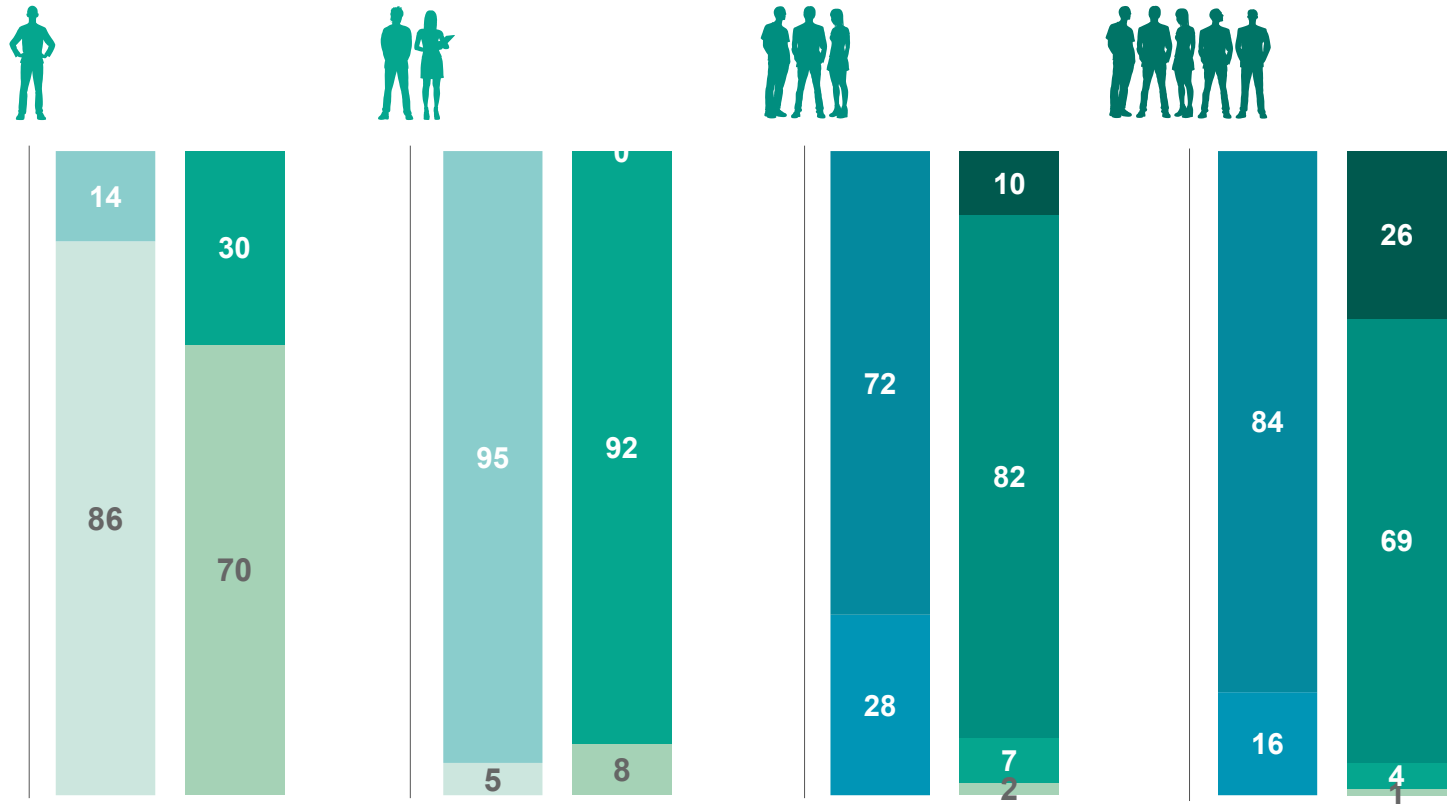
And can you please tell us the total number of cars in your fleet?
Basis: companies with passenger cars

NUMBER OF LIGHT TRUCKS IN FLEET

In %

Light trucks





And can you please tell us the total number of Light trucks or vans in your fleet?
Basis: companies with Light TRUCKS

VEHICLES POSSESSION LENGTH



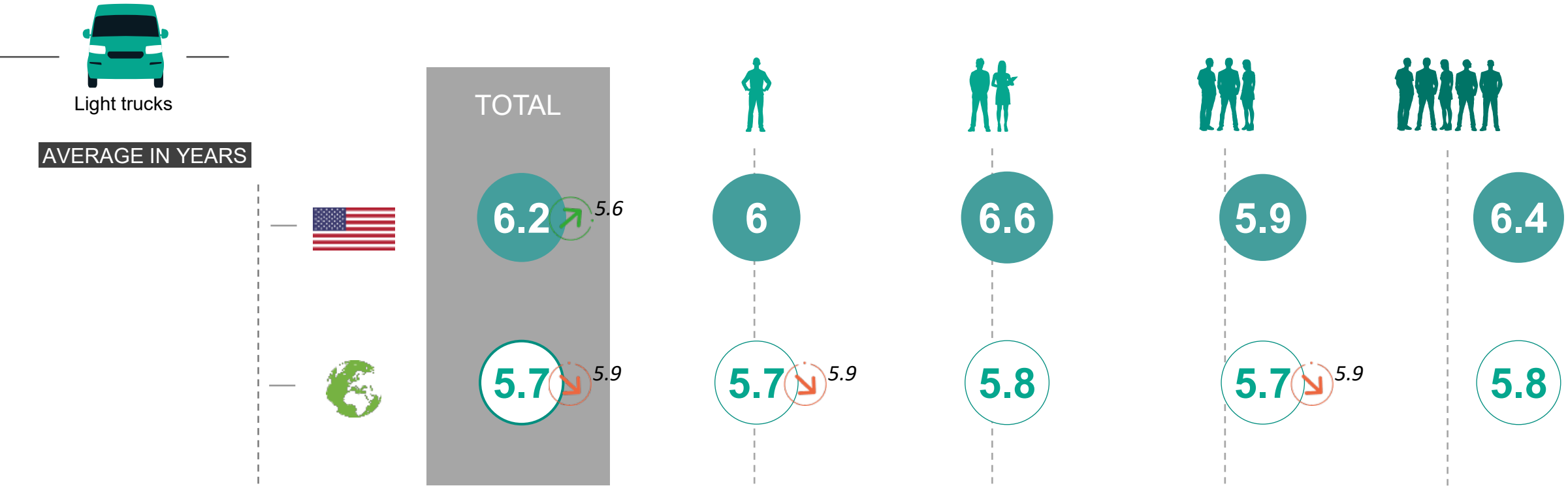
On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
Basis: companies with corporate vehicles = 100%

PASSENGER CARS POSSESSION LENGTH



And how long do you keep your passenger cars (before being sold or returned to the leasing company)?
Basis: companies with passenger cars

LIGHT TRUCKS POSSESSION LENGTH



And how long do you keep your Light trucks, light commercial vehicles or vans (before being sold or returned to the leasing company)?
Basis: companies with Light trucks

VEHICLE REPLACEMENT



Passenger cars

		TOTAL	1	2	3-4	5+
Cars	AVERAGE IN MONTHS	51	51	53	51	50
	AVERAGE MILES/KM	83100	81700	89400	82400	80700
SUVs	AVERAGE IN MONTHS	61	59	60	63	65
	AVERAGE MILES/KM	112400	115200	111300	111800	109600

New question added in 2024

Generally, when do you replace your vehicles (in months and /or in miles)?

Basis: companies with passenger cars

VEHICLE REPLACEMENT



Light trucks

		TOTAL				
Pick ups	AVERAGE IN MONTHS	68	68	70	67	69
	AVERAGE MILES/KM	133500	129400	142200	129800	136200
Medium Trucks	AVERAGE IN MONTHS	69	68	67	71	71
	AVERAGE MILES/KM	101100	99800	97900	110500	93700
Heavy Trucks	AVERAGE IN MONTHS	70	71	74	65	71
	AVERAGE MILES/KM	161900	161700	168300	160700	157600

New question added in 2024

Generally, when do you replace your vehicles (in months and /or in miles)?

Basis: companies with Light trucks

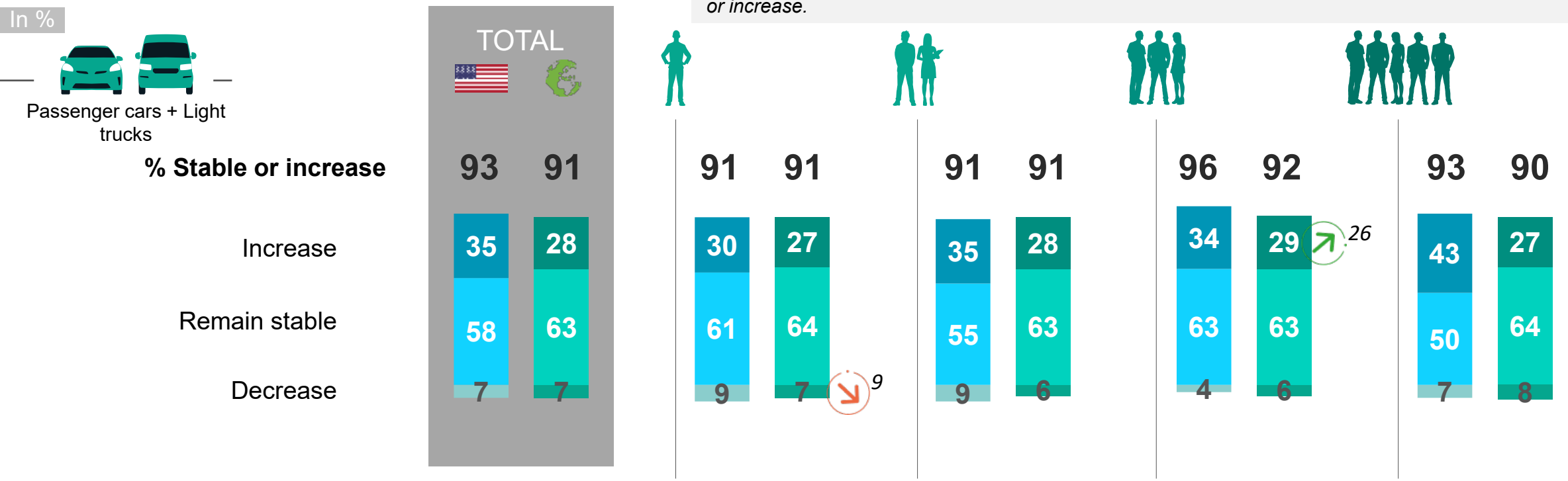
FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In USA, 93% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + Light trucks



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+28	+21	+21	+20	+26	+21	+30	+23	+36	+19
2023	+23	+20	+19	+19	+20	+22	+30	+19	+21	+21
2022	-	+20	-	+21	-	+21	-	+19	-	+17

In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

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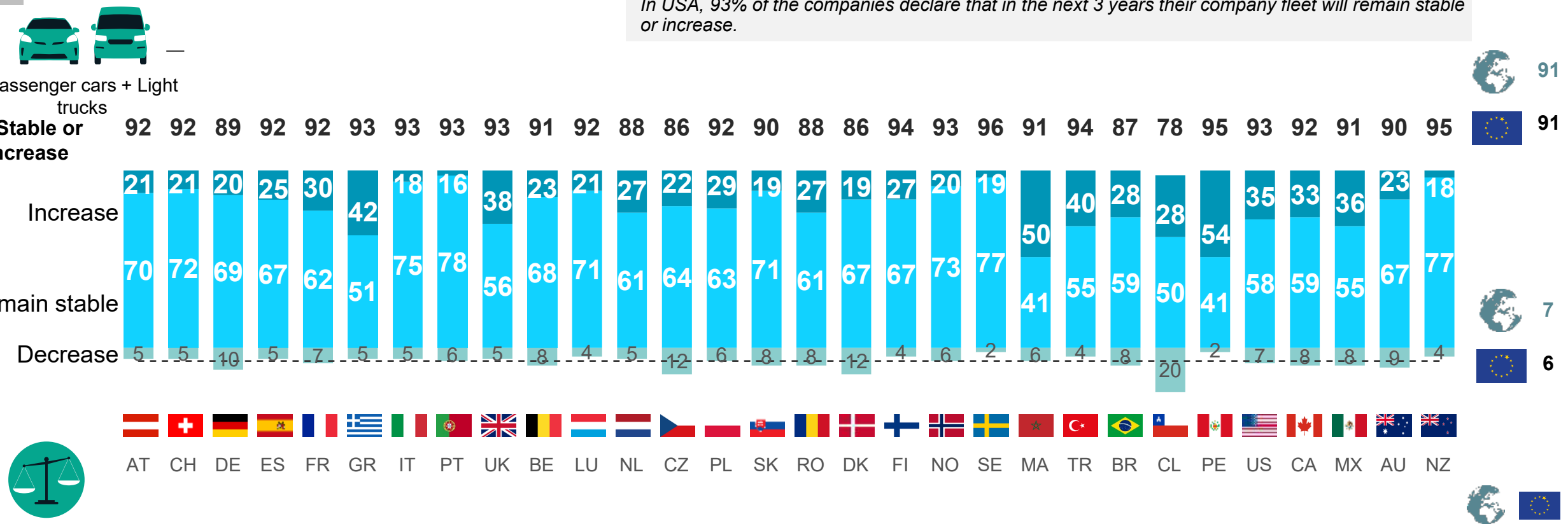
FLEET GROWTH POTENTIAL

In %

HOW TO READ THE RESULTS ?

In USA, 93% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

Passenger cars + Light trucks



	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ		
2024	+17	+15	+10	+20	+22	+37	+13	+10	+33	+15	+17	+22	+10	+23	+11	+20	+7	+24	+14	+16	+44	+36	+21	+9	+52	+28	+25	+28	+15	+13	+21	+18
2023	+17	+11	+13	+14	+21	+34	+19	+9	+24	+14	+15	+15	+9	+24	+7	+22	+8	+22	+12	+12	+46	+34	+21	+26	+44	+23	+24	+30	+11	+16	+20	+16
2022	+18	+13	+18	+16	+24	+24	+18	+22	+27	+13	+19	+23	+7	+22	+13	+23	+10	+21	+11	+14	+33	+14	+19	+24	+49	-	-	-	-	-	+20	+18

In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

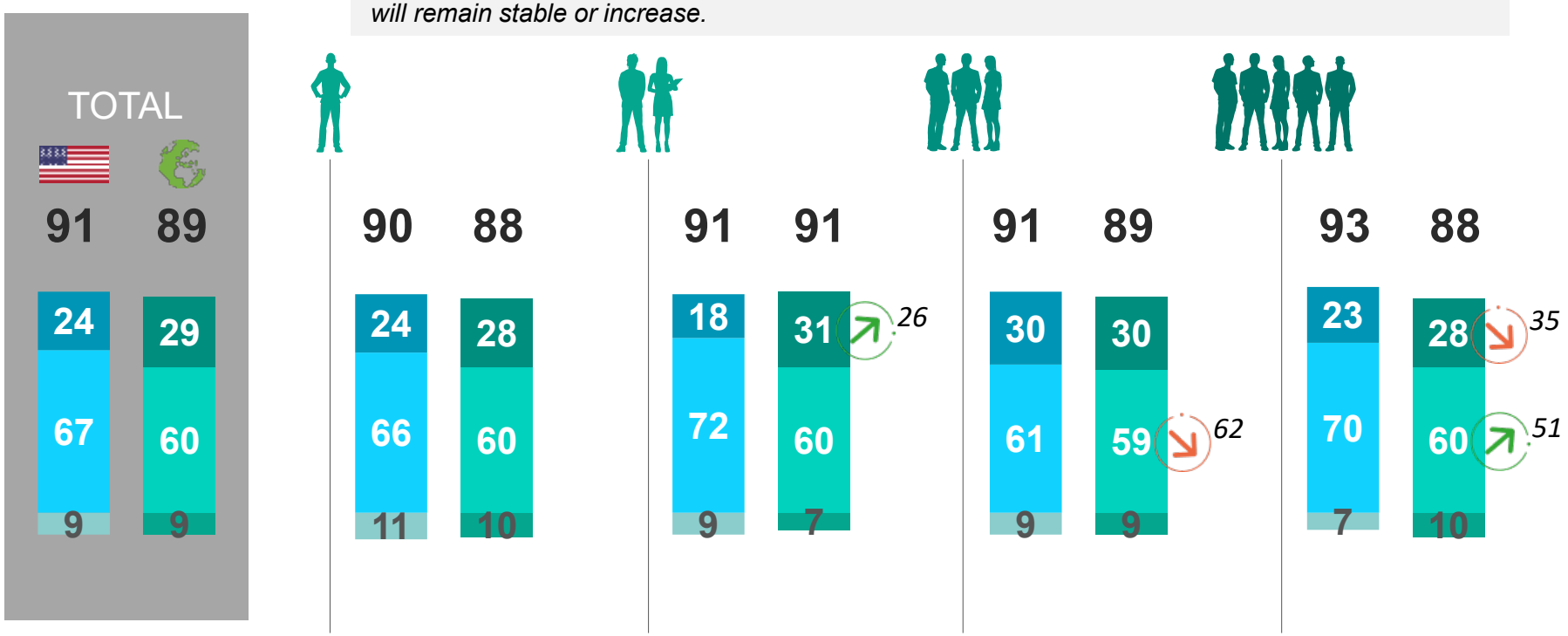
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In USA, 91% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.

In %

Passenger cars



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+15	+20	+14	+19	+9	+24	+21	+21	+16	+18
2023	+21	+20	+17	+19	+16	+18	+29	+19	+22	+24

In the next three years, do you think that the total number of your passenger cars will...

Basis: companies with passenger cars

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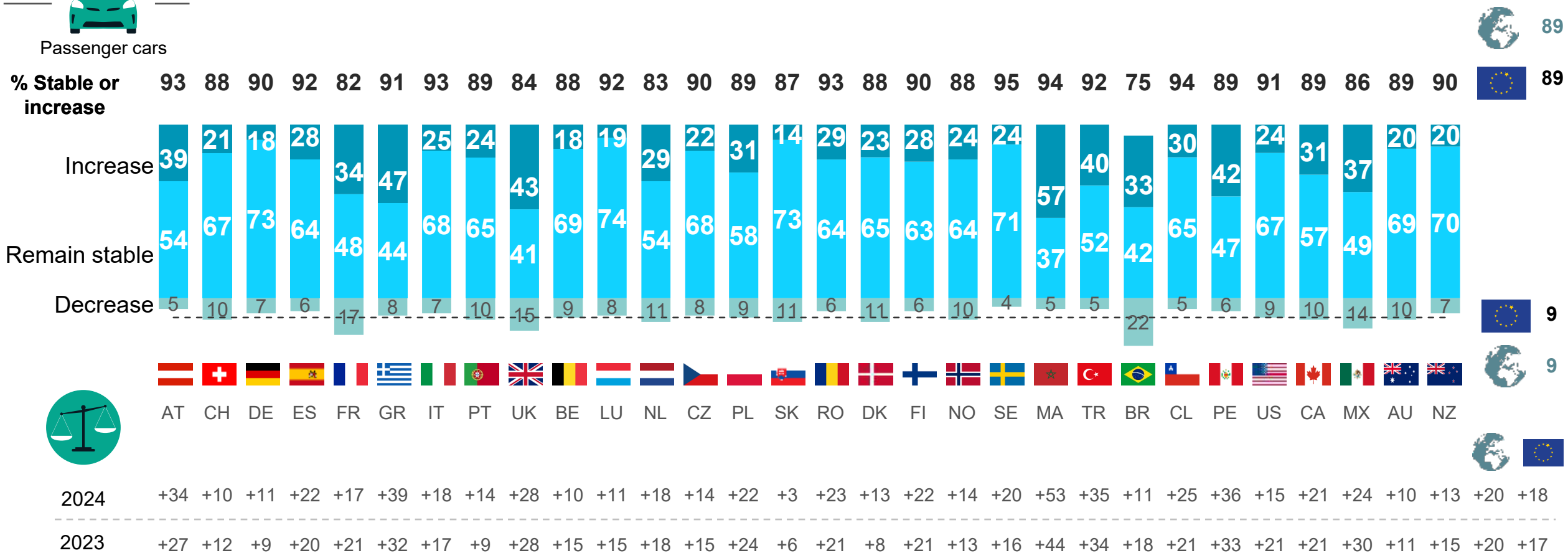
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In USA, 91% of the companies declare that in the next 3 years their company fleet of passenger cars will remain stable or increase.

In %

Passenger cars



In the next three years, do you think that the total number of your passenger cars will...

Basis: companies with passenger cars

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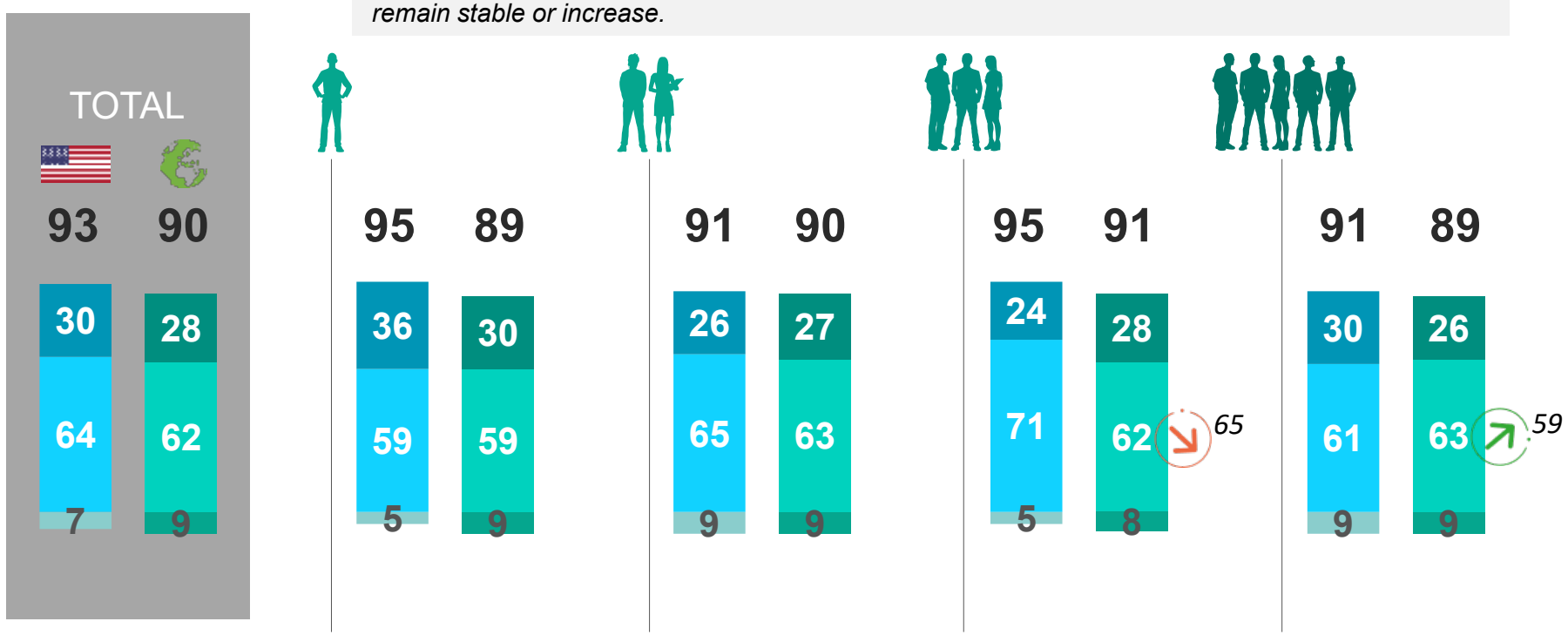
LIGHT TRUCKS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In USA, 93% of the companies declare that in the next 3 years the total number of Light trucks will remain stable or increase.

In %

Light trucks



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+23	+19	+31	+20	+17	+18	+19	+20	+21	+17
2023	+24	+19	+21	+21	+18	+18	+31	+19	+21	+20

In the next three years, do you think that the total number of your light commercial vehicles or vans will…

Basis: companies with Light trucks

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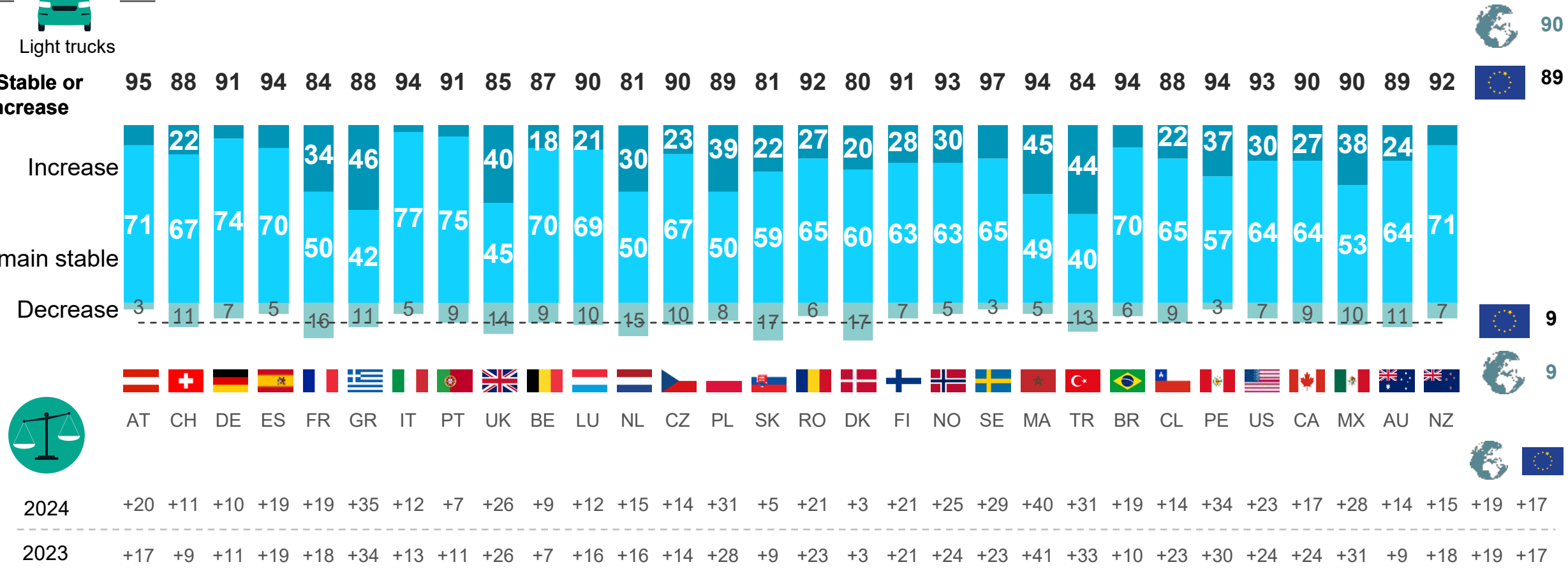
LIGHT TRUCKS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In USA, 93% of the companies declare that in the next 3 years their company fleet of Light trucks will remain stable or increase.

In %

Light trucks



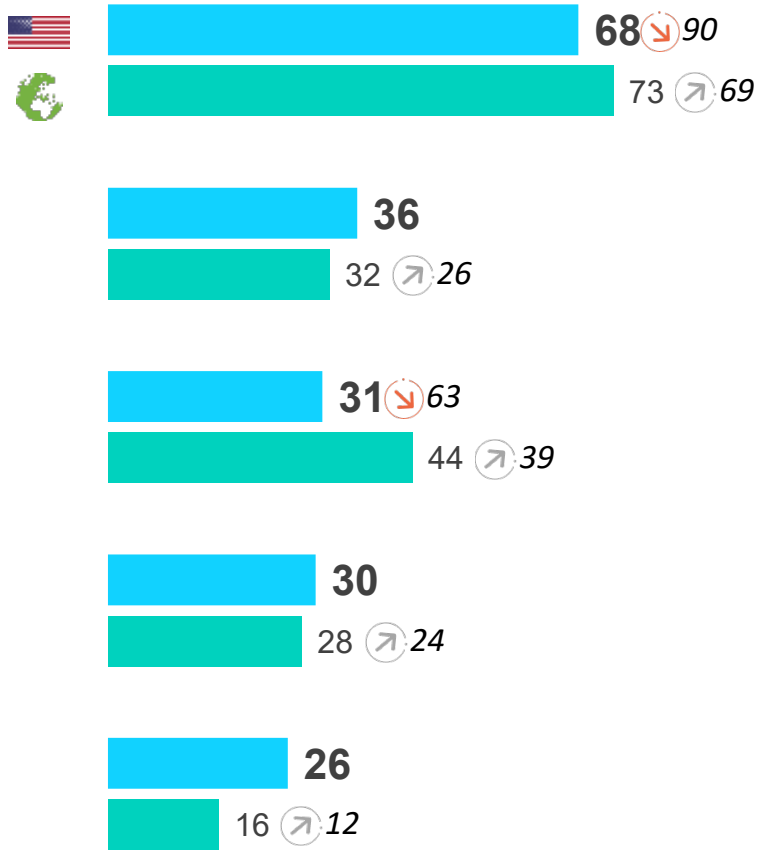
In the next three years, do you think that the total number of your light commercial vehicles or vans will...

Basis: companies with Light trucks

REASON FOR FUTURE FLEET INCREASE

In %

Passenger cars + Light trucks



Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

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XX Significantly higher than 2023 year
XX = score 2023

XX Significantly lower than 2023 year
XX = score 2023

SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

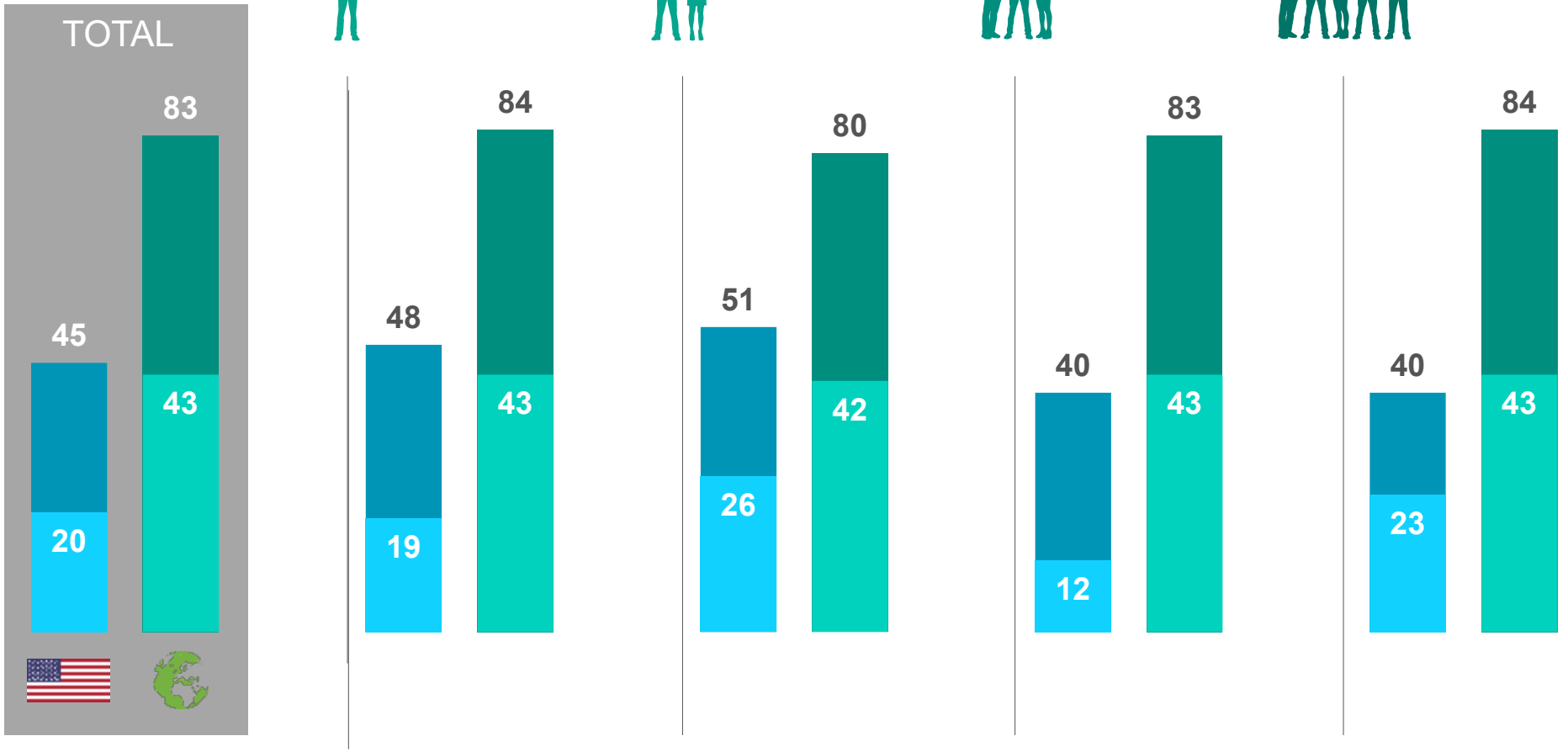
In USA, 45% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 20% of the companies are currently using some.

In %

Passenger cars + Light trucks

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with corporate vehicles = 100%

MOBILITY POLICY ADAPTATION COINCIDING WITH REMOTE WORKING

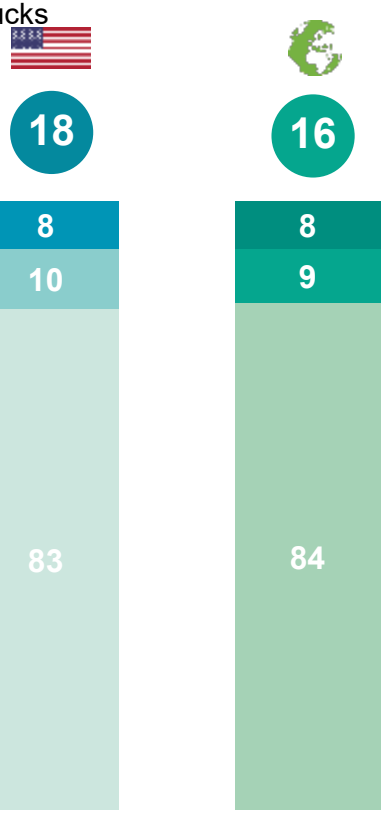
HOW TO READ THE RESULTS ?

In USA, among the companies that changed or consider changing their mobility policy, 5% have already reduced the total number of the vehicles in the company's fleet.

In %

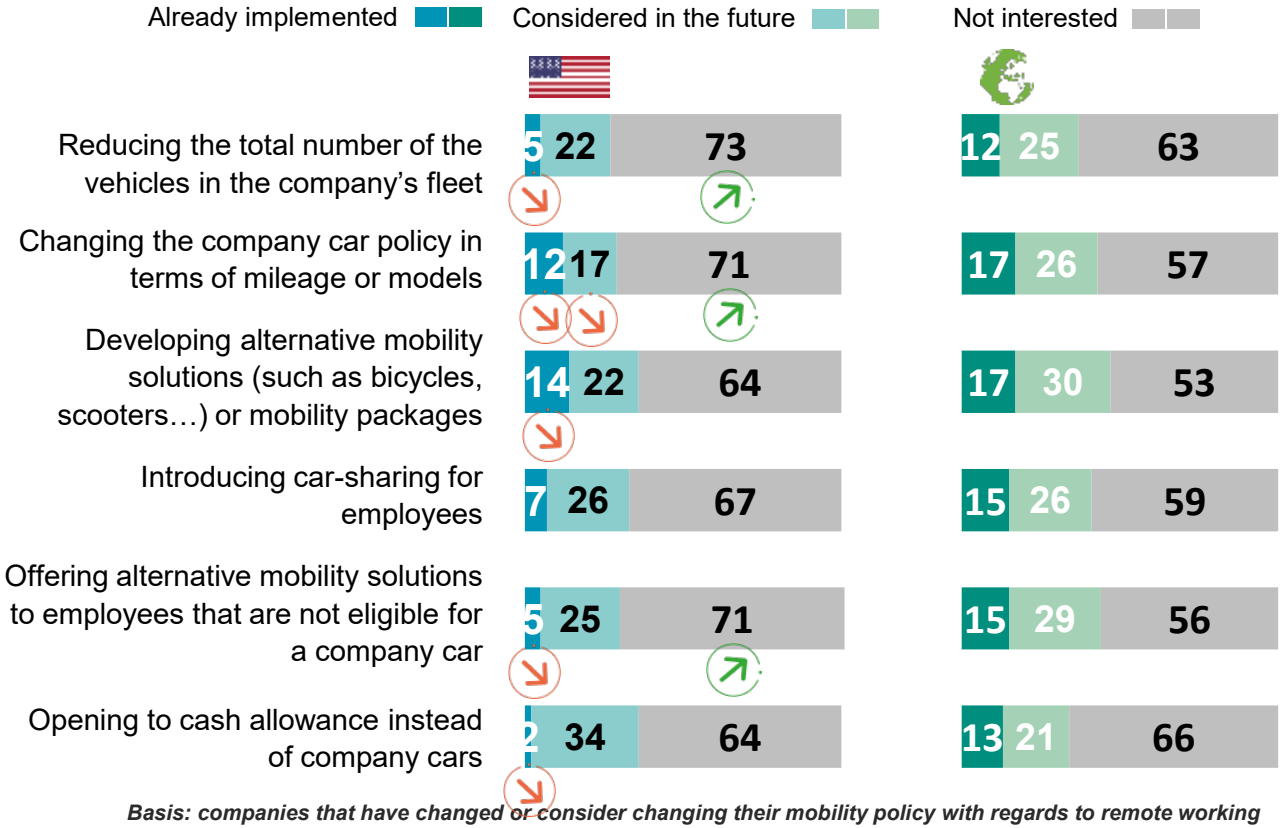
Passenger cars + Light trucks





NET CHANGED THE POLICY OR CONSIDER CHANGING

- Yes, we have already changed our mobility/fleet policy
- Yes, we are considering changing our mobility/fleet policy
- No, we haven't changed nor consider changing anything due to remote working



Basis: companies with corporate vehicles = 100%

Basis: companies that have changed or consider changing their mobility policy with regards to remote working

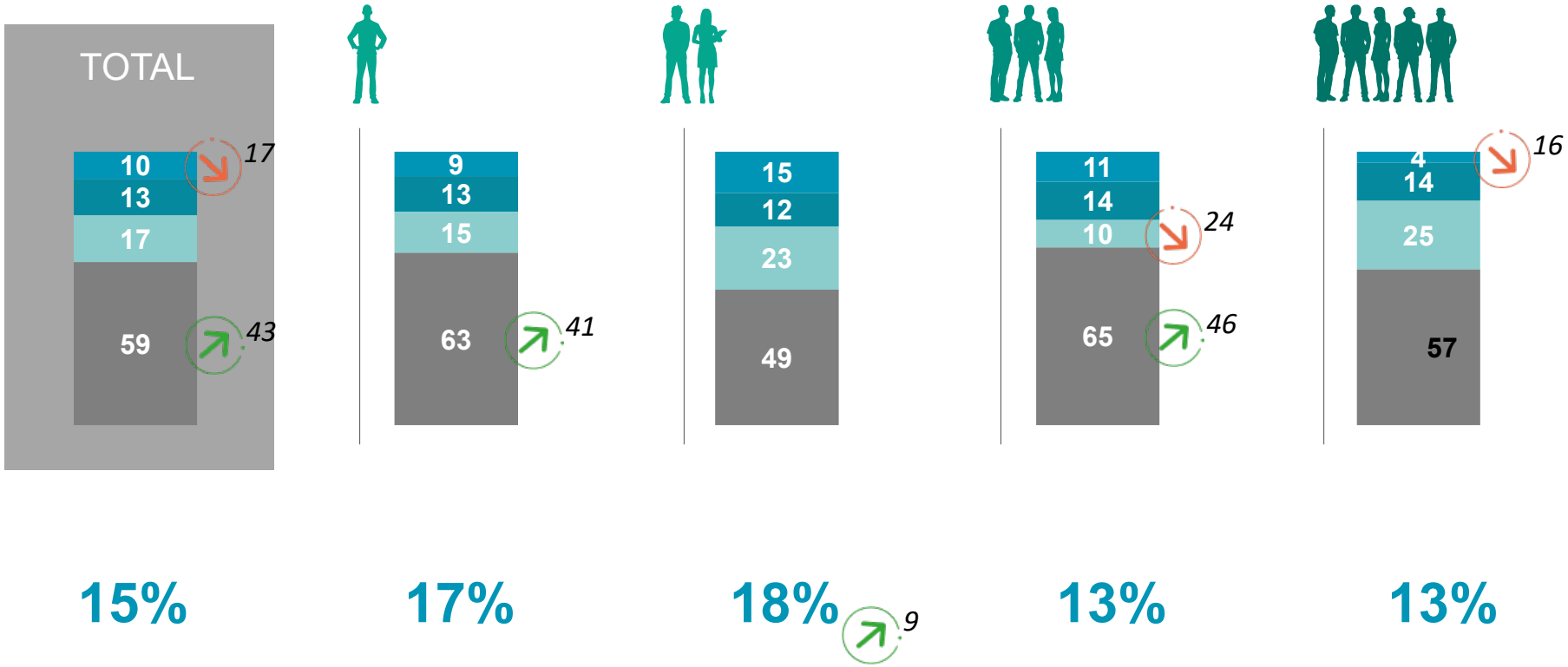
With regards to the development of remote working, have you changed, or do you consider changing your mobility/fleet policy?
And among the following changes, can you please select those you have implemented or consider implementing with regards to the development of remote working?

Question asked to respondents that are aware of mobility solutions

REMOTE WORKING EVOLUTION SINCE COVID CRISIS

In %

Passenger cars + Light trucks



Have introduced
Have increased
Kept the same level
Don't allow

Expected decrease of kms for the car drivers

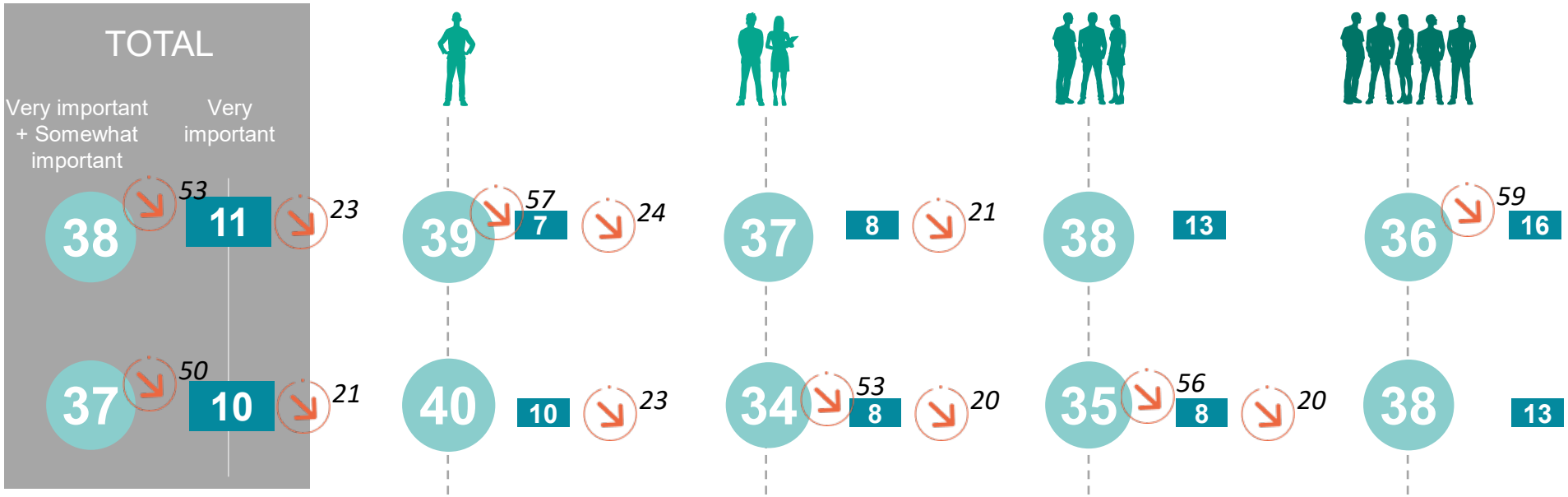
15% **17%** **18%** 9 **13%** **13%**

Have you introduced or increased remote working for your employees since the beginning of the Covid crisis?
Basis: companies with corporate vehicles = 100%
What would be the expected decrease in mileage for your company car drivers (in %) due to remote working
Basis: companies which have introduced or increased or kept the same level of remote working ?

IMPORTANCE TO RECEIVE ADVICE AND SERVICES FOR FLEET

In %

Passenger cars + Light trucks

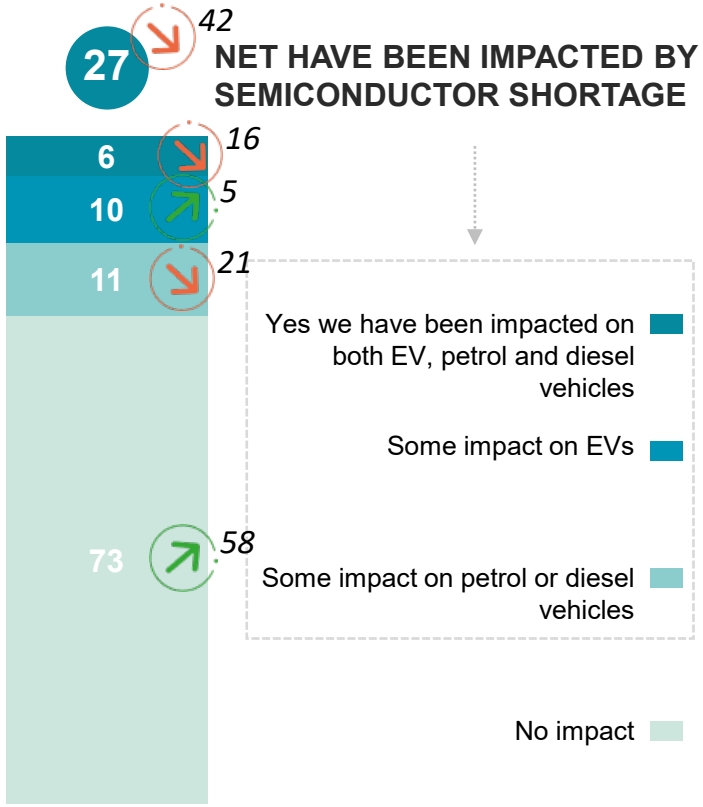


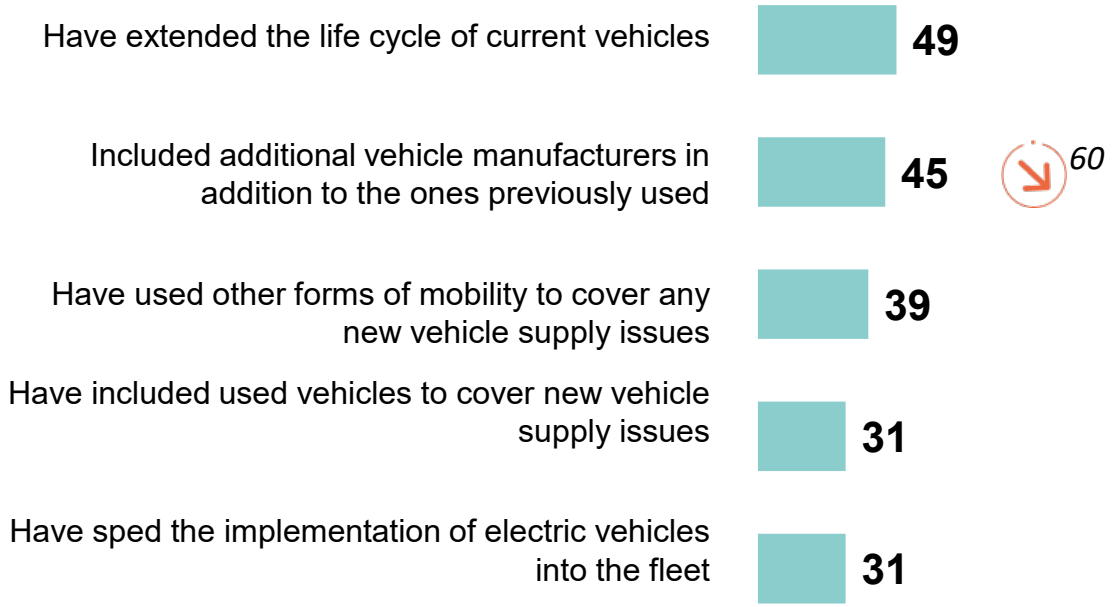
How important is it to receive technical and operational consultancy (e.g. best vehicle / fit out options) with respect to your fleet?
How important is it to receive financial and legislative advice (e.g. funding options / CO_2) with respect to your fleet?
Basis: companies with corporate vehicles = 100%

IMPACT OF SEMICONDUCTOR SHORTAGE ON THE FLEET AND TAKEN ACTIONS

In %

Passenger cars + Light trucks





Basis: companies that have been impacted by semiconductor shortage

Basis: companies with corporate vehicles = 100%

Have your fleet renewals been impacted by the semiconductor shortage??
What actions have you taken in response to the impact on your fleet due to the semiconductor shortage?

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STRATEGIES ADOPTED IN RESPONSE TO RISING PETROL AND DIESEL PRICES

In %

Passenger cars + Light trucks



	TOTAL											
We are monitoring driver behaviour on the road	13	27	10		20		10	38	16	
We are monitoring fuel spending using fleet software	11	19	13		8		16		5	31
We have made economies elsewhere in our business as a result	11	24	9	19	12	26	10	30	12	
We are buying fuel from lower price outlets	10	21	8		11		10	30	11	
We are covering fewer miles	9	26	6	23	12	26	10	28	9	26
We have adopted a fuel card	7	19	6		6		4	24	12	31
We have sped the electrification of our fleet	7		8		8		6		4	18
None of the above	68	43	72	55	65	44	65	34	68	36

Which of these strategies have you adopted in response to rising petrol and diesel prices?
Basis: companies with corporate vehicles = 100%

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EXPECTATIONS TOWARDS VEHICLE COSTS DURING NEXT YEAR

In %

Passenger cars + Light trucks



What do you expect to happen to vehicle costs in these areas during the next year for your fleet?
Basis: companies with corporate vehicles = 100%

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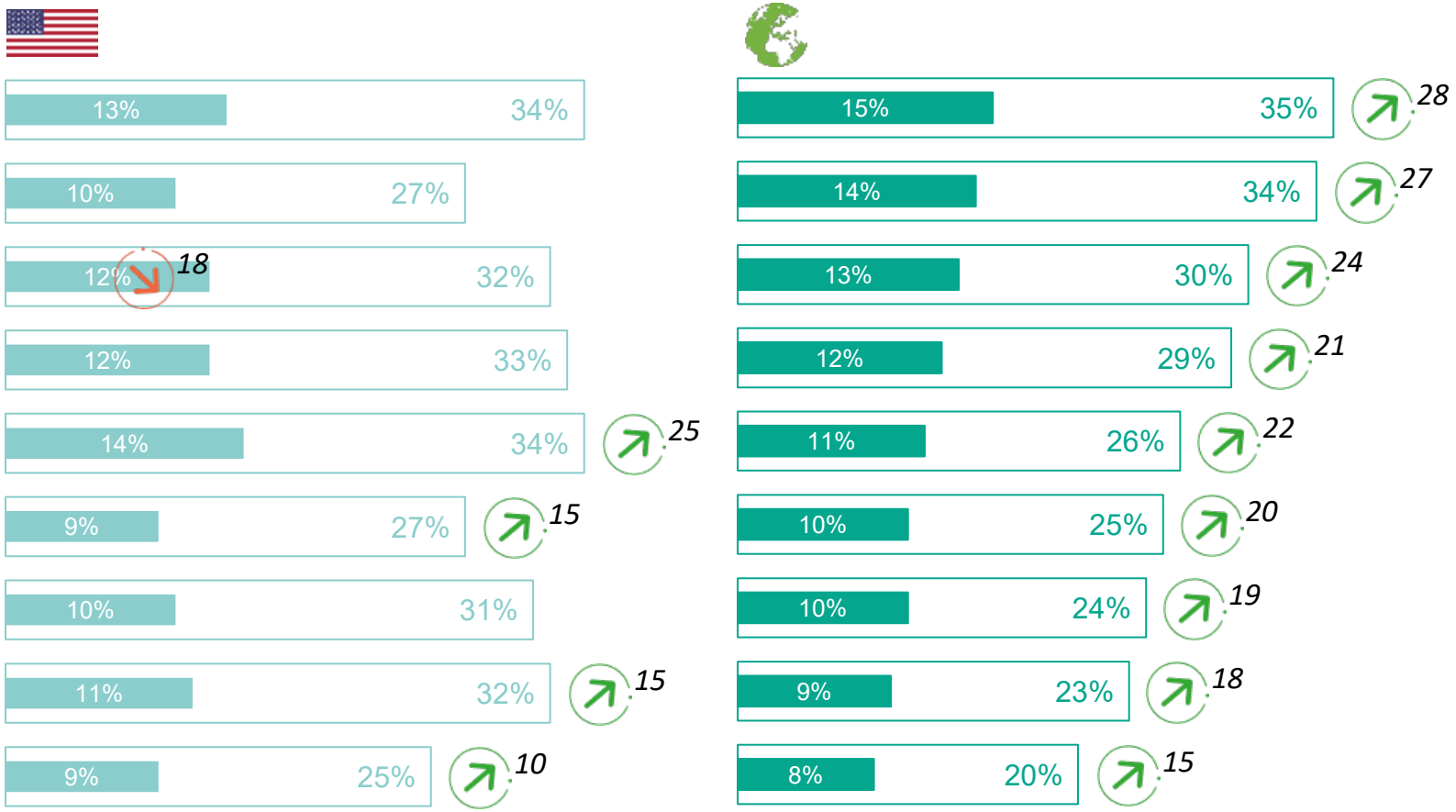
MOST IMPORTANT CHALLENGES EXPECTED

In %

Passenger cars + Light trucks

Nb 1 challenge

Top 3 challenges



We will now ask you to rank these challenges by order of importance. According to you, what is the most important challenge for the fleet management in the next three years ? And what is the second most important challenge ? What is the third most important challenge ?
Basis: companies with corporate vehicles = 100%

4

HOW ARE COMPANIES FINANCING THEIR FLEET?





LEASING IS THE MAIN FINANCING METHOD USED - OPERATING LEASING GROWTH BEING EXPECTED AMONG THE SMALLEST COMPANIES

1. **Leasing is the main financing method used** to date (48%), ahead of outright purchase(43%). The picture is the same for passenger cars and for light trucks.

2. **Operating leasing growth potential has decreased since last year** (30%, -9 pts) and is now below the global average (36%). To note though, operating leasing growth potential is **strongly driven up by the <10 employees companies** (41%).

FINANCING



OUTRIGHT PURCHASE

43%

31%



LEASING

48%

54%



CREDIT



9%

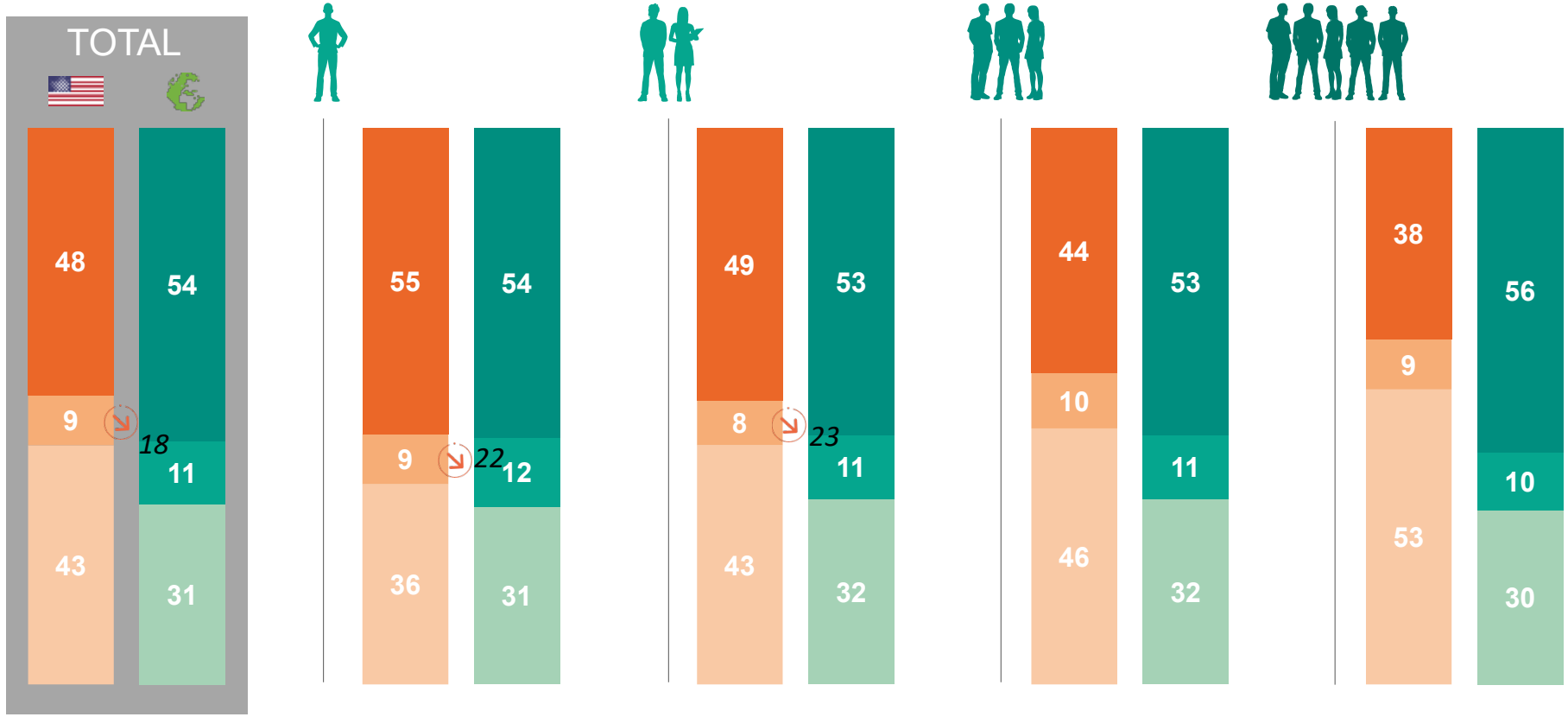
18

11%

MAIN FLEET FINANCING METHOD

In %

Passenger cars + Light trucks



What is the main financing method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

In %

Passenger cars

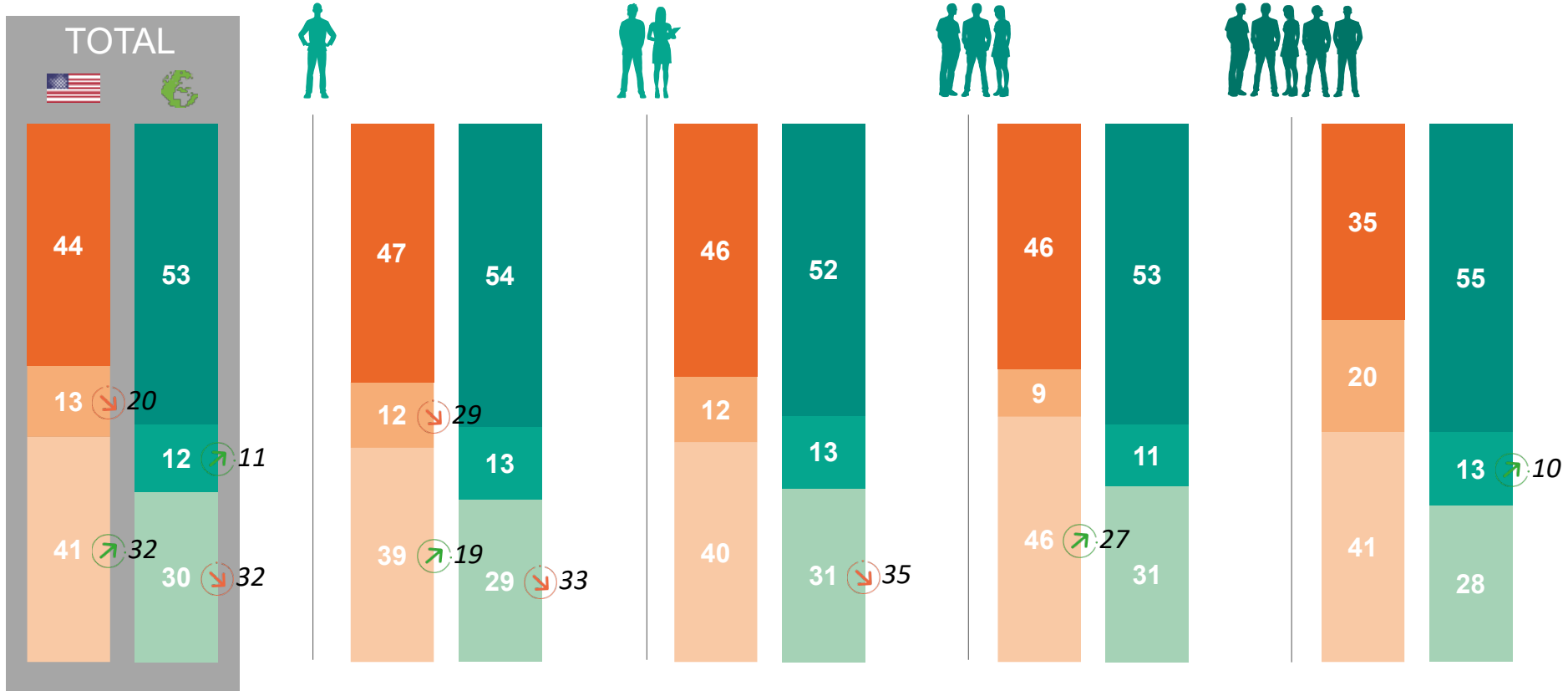


And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN LIGHT TRUCKS FINANCING METHOD

In %

Light trucks



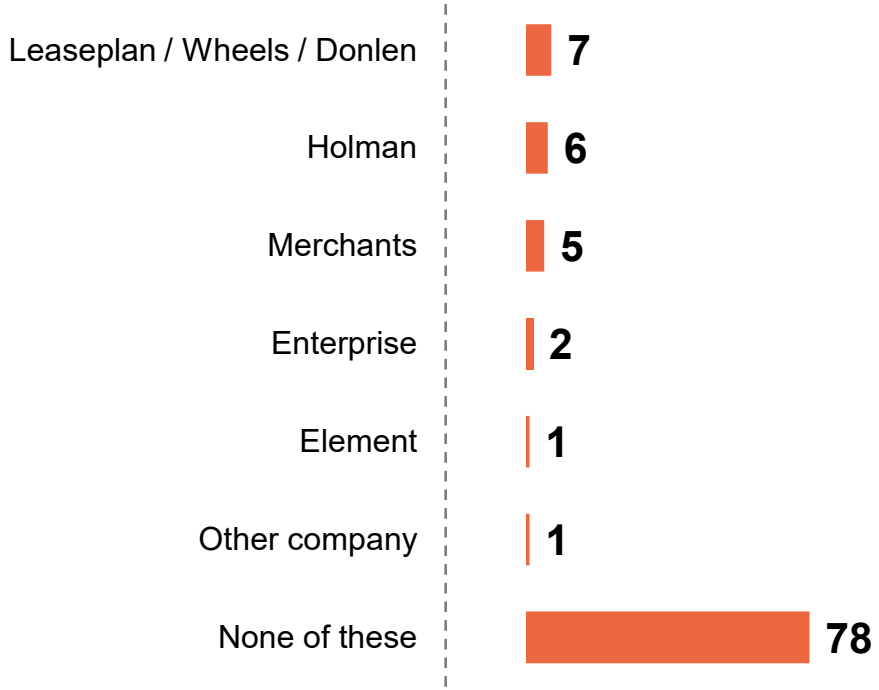
And what is the main method used to finance your Light trucks today?
Basis: companies with Light TRUCKS

OPERATING LEASING PROVIDER

In %



Passenger cars + Light trucks



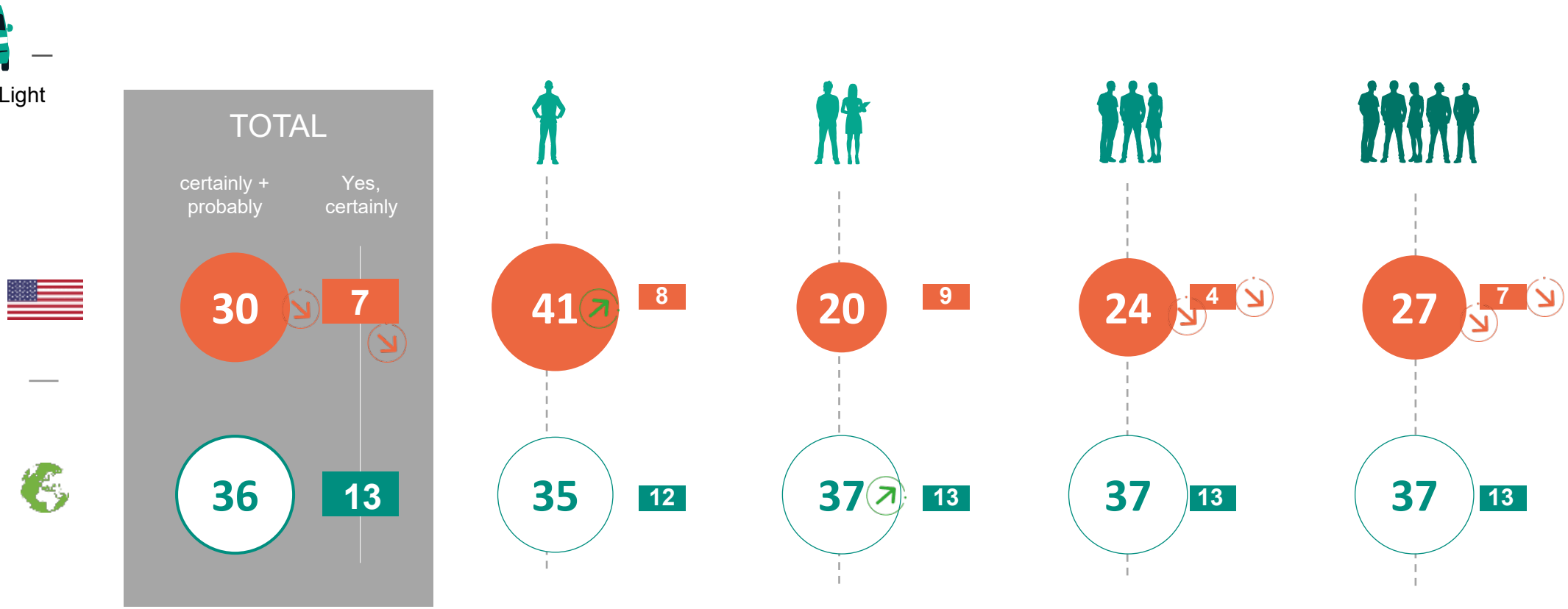
What company is your operating leasing provider ?
Basis: companies with corporate vehicles = 100%

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

Proportion of companies having the intention to introduce or increase the use of operating leasing

In %

Passenger cars + Light trucks



In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

Proportion of companies having the intention to introduce or increase the use of operating leasing

In %



Passenger cars + Light trucks

		TOTAL								
		Total certainly + probably	Yes, certainly							
	2024	30	7	41	8	20	9	24	4	27	7
	2023	39	19	25	14	26	15	56	25	51	21
	2024	36	13	35	12	37	13	37	13	37	13
	2023	35	12	34	12	32	12	37	12	37	14

In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

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5

WHAT CHANGES ARE TO BE EXPECTED IN THE NEAR FUTURE REGARDING ENERGY MIX?



ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES IS SOMEHOW LIMITED FOR PASSENGER CARS – BUT STRONGER FOR LIGHT TRUCKS FLEETS

1

To date, **3 companies out of 10 are using alternative fuel technologies for their passenger cars** in the USA (PHEV, HEV or 100% BEV), below the 49% global average. The adoption potential is also more limited in the USA than globally (39% vs 70%).

As for passenger cars again, adoption levels are similar for 100% BEV (16%) and for HEV (14%), PHEV being somehow distanced (9%). The picture is the same whatever the company size. The reasons for adopting alternative fuel technologies for passenger cars are numerous, diverse and in line with the global benchmark overall. They are mainly related to their lower environmental impact (34%), improving the company's image (32%), and the reduction in fuel expenses (31%).

As for light trucks, the implementation of alternative fuel technologies (100% BEV and Fuel Cell) is rather strong in the USA: 1 out of 4 companies are using them, quite above the 11% global average. The adoption of these technologies is even higher among the >1000 employees companies (34%). The fact their total cost of ownership is in line with or lower than petrol or diesel alternatives (25%) and improving the companies' image (24%) are the main drivers of the adoption of these alternatives for light trucks.

2

The higher purchase price, the limited range of models and the lack of charging points (even though 3 out of 10 plan to install some at their premises in the next year) **are still the main barriers to the adoption of 100% BEV**, whether for passenger cars or for light trucks. Larger models ranges and TCO would be the main reasons to start ordering more 100% BEVs.

3

Overall, companies are more prepared to operate zero-emission vehicles in response to the **Government ban on the sale of new petrol and diesel vehicles in 2030** for light trucks (78%) than for passenger cars (47%) – these preparations remain at early stages in most cases anyhow. **In the next 3 years, most corporate vehicles are still expected to be ICE motorized** (72% for the passenger cars and 86% for the light trucks).

4

At last, **less than 2 out of 10 companies are eligible to an ESG regulatory public reporting**. 4 more will be eligible in the next 2 years. In this perspective, employees mobility is highly important for 3 out of 10 companies among them.

ENERGY MIX

AT LEAST ONE ALTERNATIVE IMPLEMENTED OR CONSIDERED*

for Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

39% 79

70%

AT LEAST ONE ALTERNATIVE IMPLEMENTED

for Passenger cars

31% 58

49%

EXPECTED PART OF 100% ELECTRIC PASSENGER CAR IN 3 YEARS

13%

17% 18

EXPECTED PART OF 100% ELECTRIC LIGHT TRUCKS IN 3 YEARS

5% 9

10% 12

*LIST OF ENERGIES: Hybrid, Plug-in Hybrid, 100% Battery Electric Vehicle

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

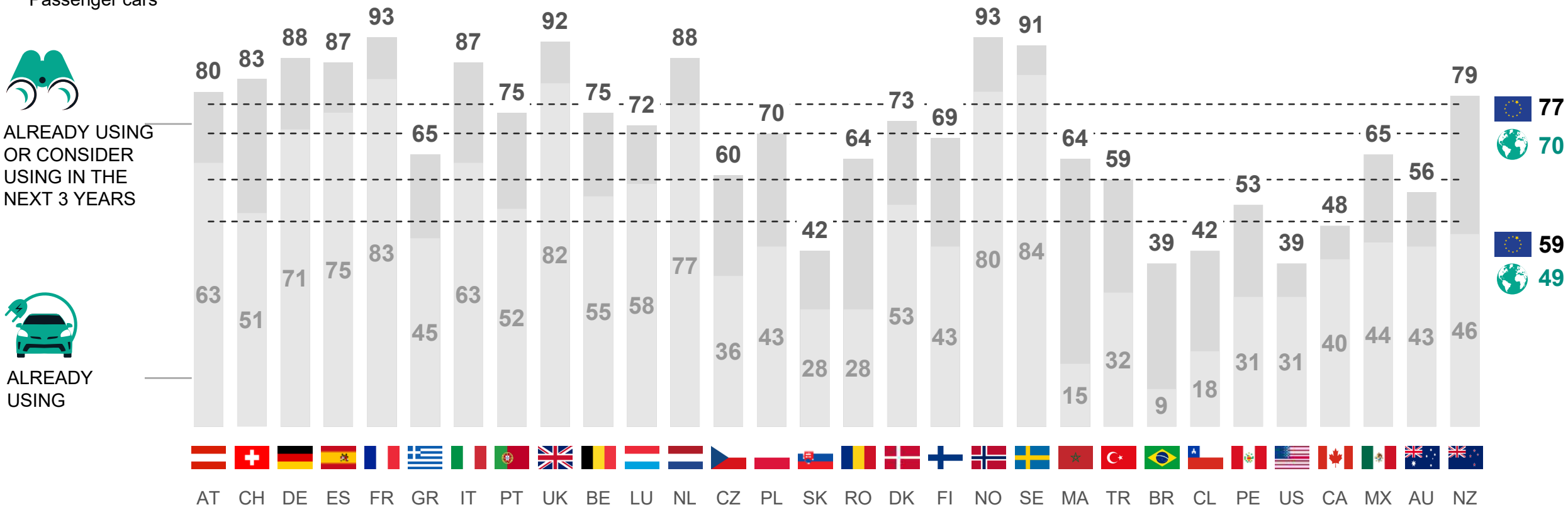
(At least one technology among HEV, PHEV and 100% BEV)

In %

Passenger cars

HOW TO READ THE RESULTS ?

In USA, 39% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 31% of the companies is currently using at least one.



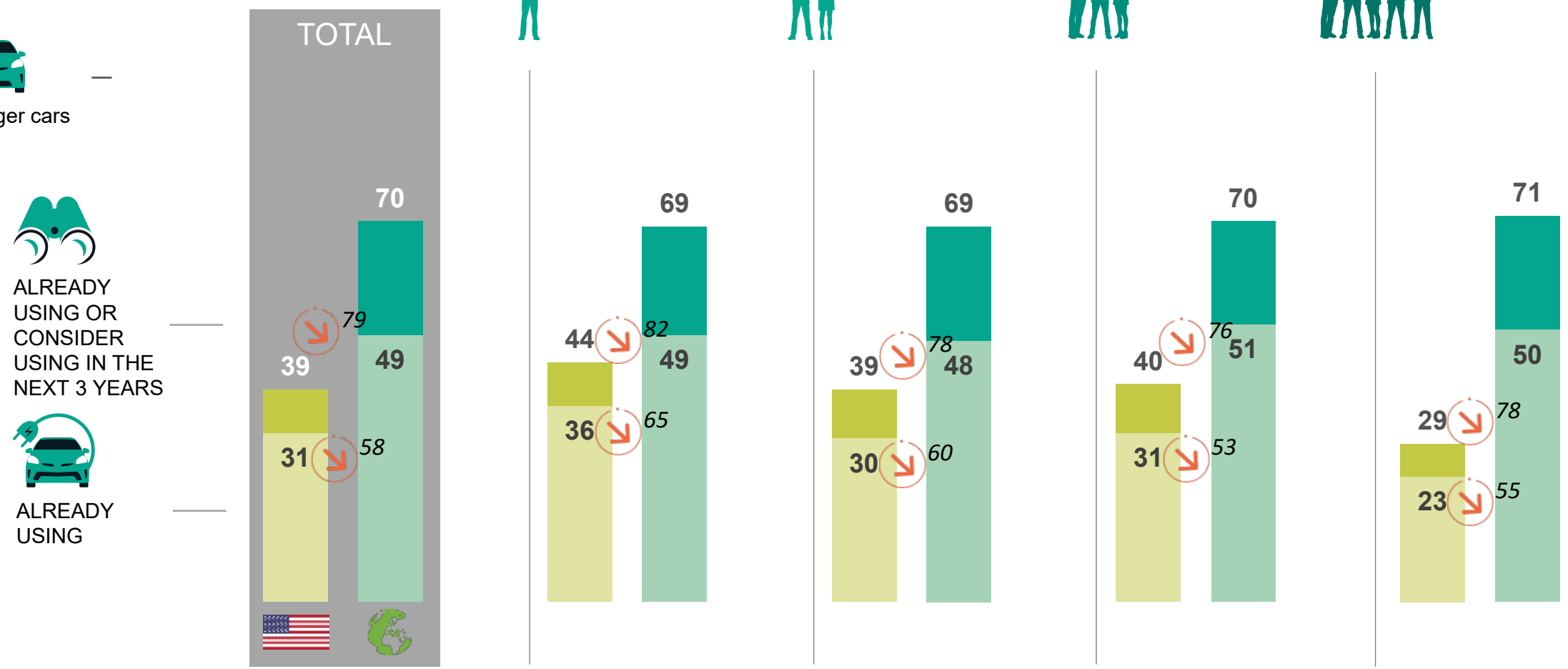
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

(At least one technology among HEV, PHEV, 100% BEV)

In %

Passenger cars



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

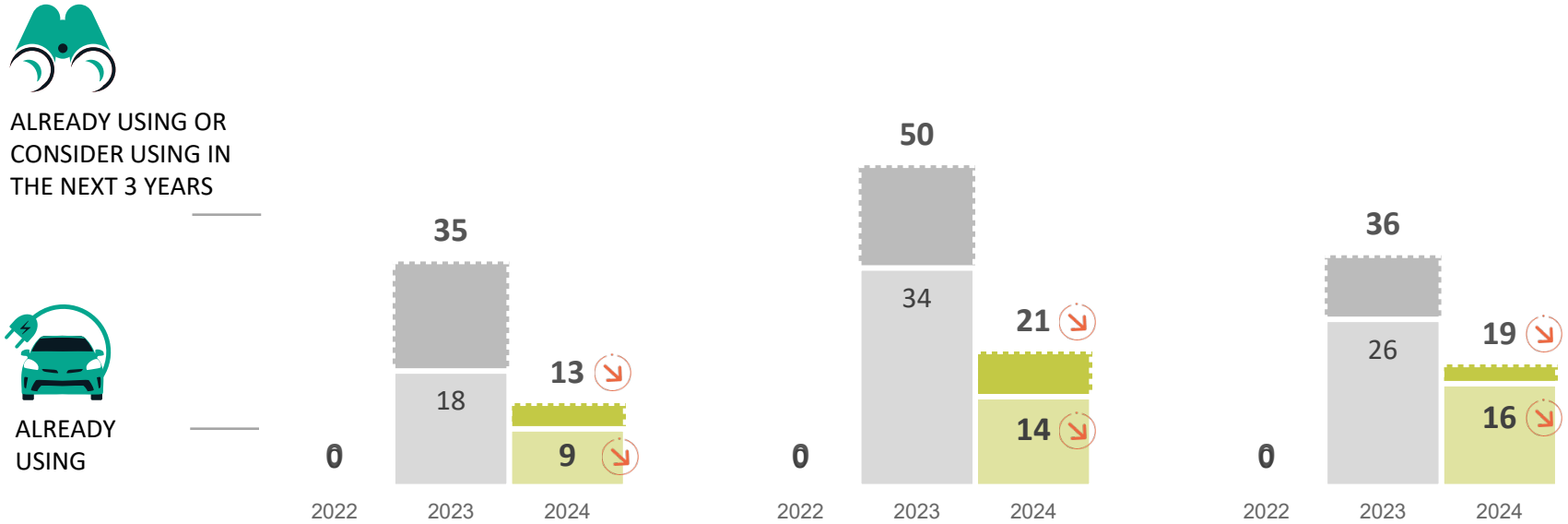
Evolution vs. previous years

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



	2022	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	32	37	36 ▲
ALREADY USING	20	23	23 ▲
Plug-in Hybrid	0	35	13 ↘
Hybrid	0	50	21 ↘
100% Battery Electric Vehicle	0	36	19 ↘

	2022	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	34	41	38 ↘ ▲
ALREADY USING	22	26	24 ↘ ▲
Plug-in Hybrid	0	18	9 ↘
Hybrid	0	34	14 ↘
100% Battery Electric Vehicle	0	26	16 ↘

	2022	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	29	34	36 ▲
ALREADY USING	16	19	20 ▲

Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

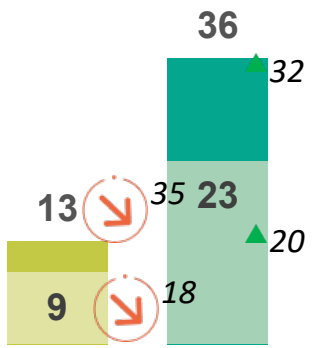
Passenger car fleet

In %

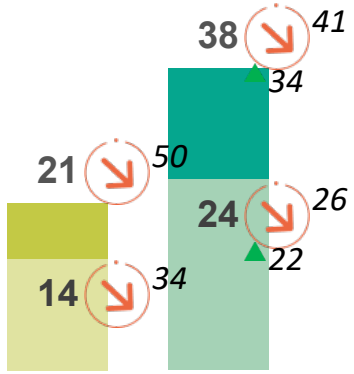
Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

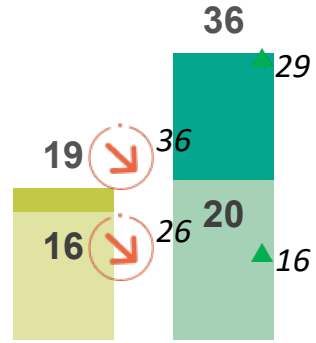
ALREADY USING



Plug-in Hybrid



Hybrid



100% Battery Electric Vehicle

Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

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REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %



Passenger cars



Because of their lower environmental impact	34	62
	38	
To improve your company image	32	56
	27	
To reduce fuel expenses	31	47
	32	
For tax incentives	29	
	22	
To anticipate future restrictive public policies	28	49
	21	18
To fulfil your employees' requests	27	42
	21	19
To be able to drive in Low Emission Zone	27	43
	24	21
Because their total cost of ownership is in line with or lower than petrol or diesel alternatives	24	37
	26	
To be compliant with your CSR (Corporate Social Responsibility) policy	22	38
	27	

Why have you already implemented or why do you consider implementing alternative fuel technologies?
Basis: companies having implemented or considering Hybrid, Plug-in Hybrid or Electric passenger cars

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

(At least one technology among 100% BEV and Hydrogen Fuel cell)

In %

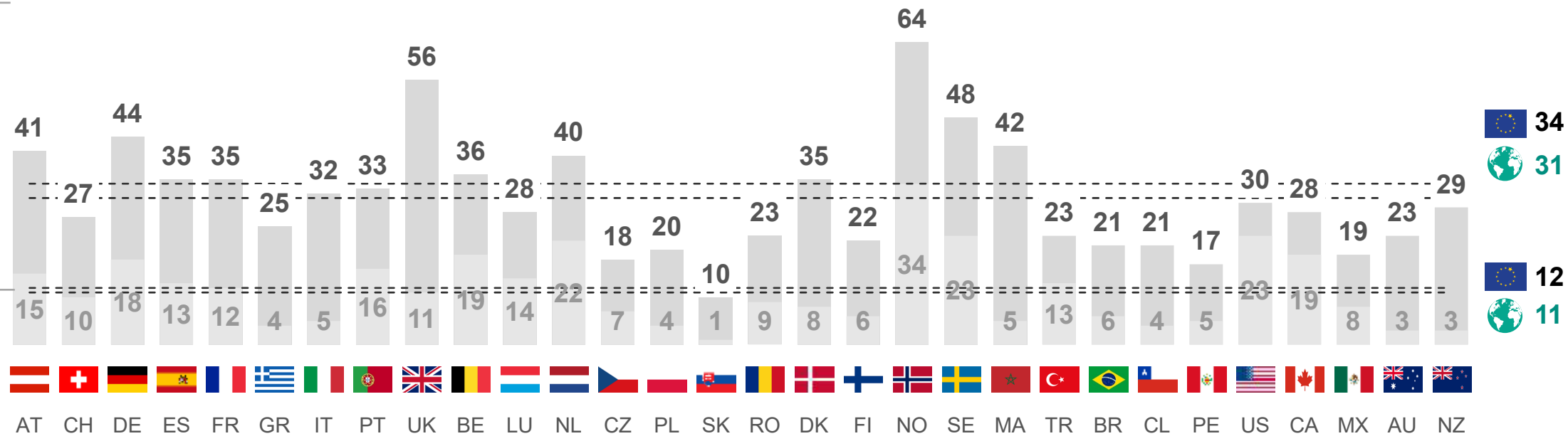
Light trucks

HOW TO READ THE RESULTS ?

In USA, 30% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 23% of the companies is currently using at least one.

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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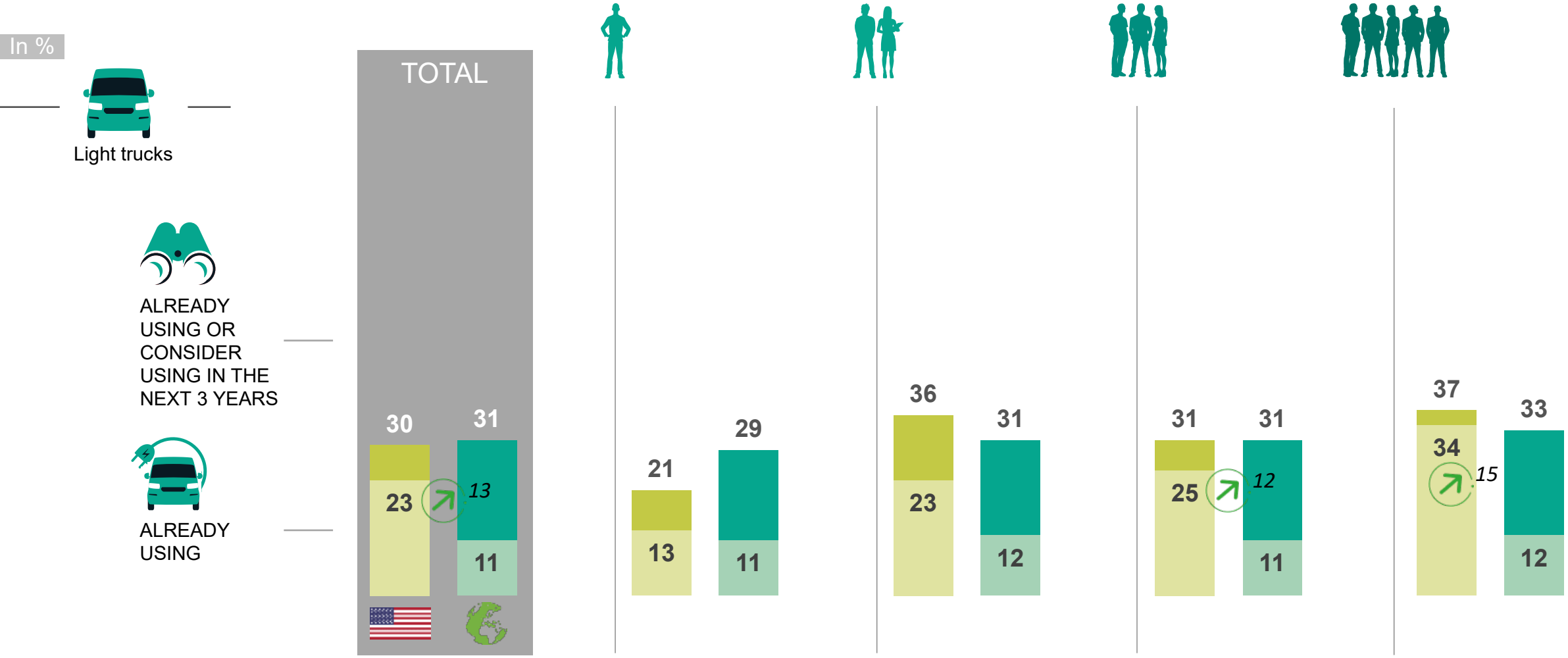
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Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

(At least one technology among 100% BEV and Hydrogen Fuel cell)



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %

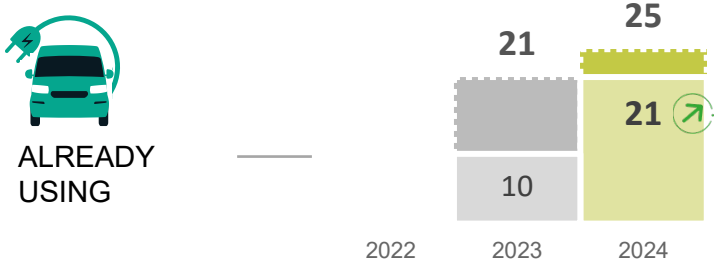
Light trucks

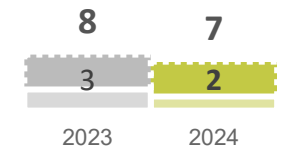
100% Battery Electric Vehicle

Hydrogen Fuel cell

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING





	2022	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	21	25	25 ▲
ALREADY USING	7	9	10 ▲

	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	9	9
ALREADY USING	2	2

Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

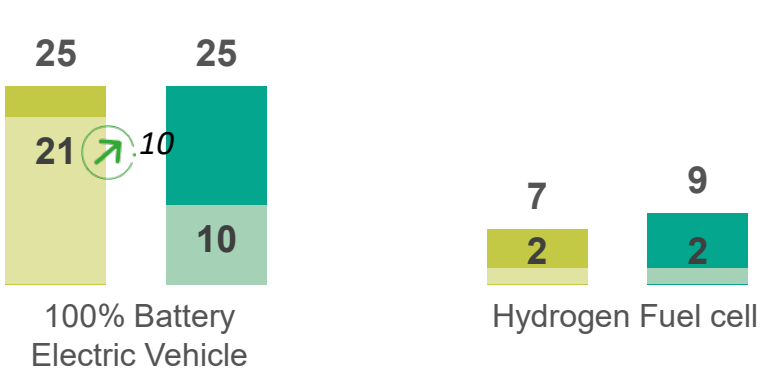
Light trucks Fleet

In %

Light trucks

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY IMPLEMENTED



100% Battery Electric Vehicle

Hydrogen Fuel cell

Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

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REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Light trucks fleet

In %



Light trucks



Why have you already implemented or why do you consider implementing alternative fuel technologies?
Basis: companies having implemented or considering 100% Battery Electric Vehicle or Hydrogen Fuel Cell for Light trucks

PREPARATION TO OPERATE ZERO-EMISSION PLAN

In %



Passenger cars + Light trucks

	Passenger cars		Light trucks	
No preparation we have plenty of time to 2030	51	40	22	40
Some preparation and planning done, we may have a zero emission fleet by 2030	33	23	60	21
Plans in place and we expect to have a part zero emission fleet by 2030	7	17	13	
Plans complete and we will have a zero emission fleet by 2030 or sooner	7	14	6	10
Other	0	2	0	6
Don't know	2		0	5
	47		78	55

At least some preparations done

How well are you prepared to operate zero-emission vehicles in response to the Government ban on the sale of new petrol and diesel vehicles in 2030?

A change of ban from 2030 to 2035 was done during the interviews period

Basis: companies with corporate passenger cars / companies with corporate Light trucks

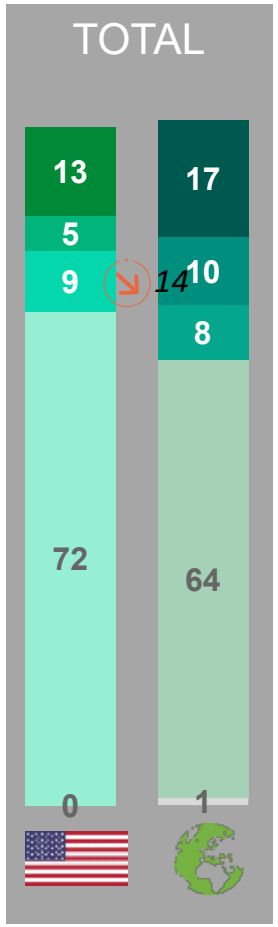
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In USA in 3 years, 13% of the companies passenger car fleet is expected to be 100% BEV

In %

Passenger cars





100% battery electric

Plug-in Hybrid

Hybrid

Petrol or Diesel

Other

In your opinion, what percentage of your passenger car fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?

Basis: companies with passenger cars

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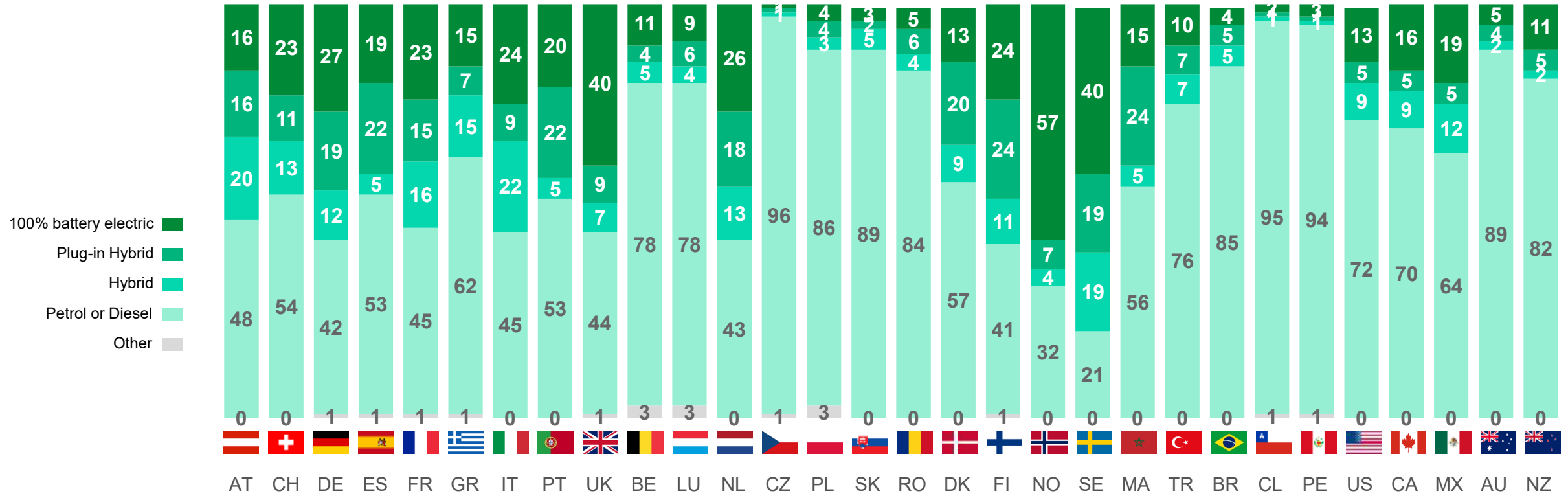
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In USA in 3 years, 13% of the companies passenger car fleet is expected to be 100% BEV.

In %

Passenger cars



In your opinion, what percentage of your passenger car fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

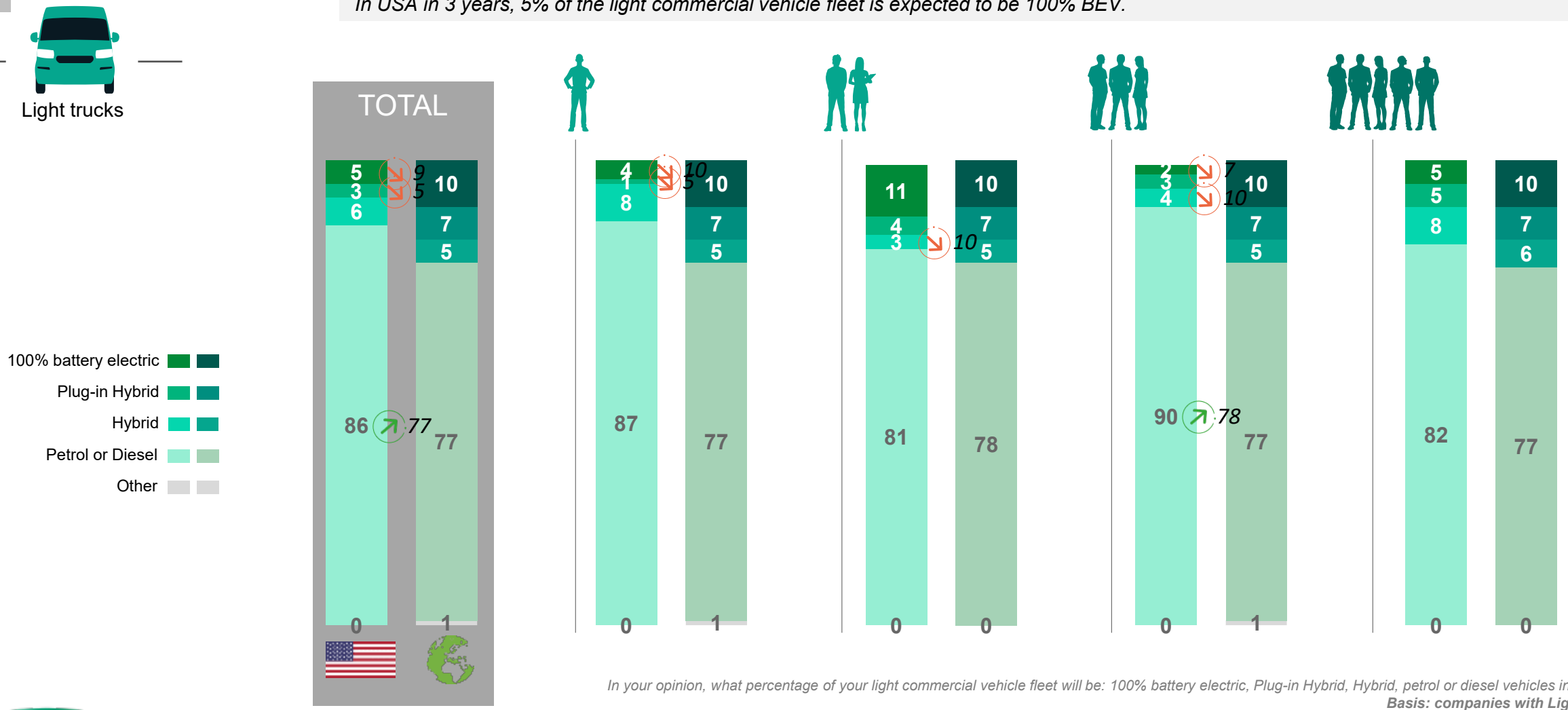
EXPECTED FLEET SHARE PER ENERGY

In %

Light trucks

HOW TO READ THE RESULTS ?

In USA in 3 years, 5% of the light commercial vehicle fleet is expected to be 100% BEV.



In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with Light trucks

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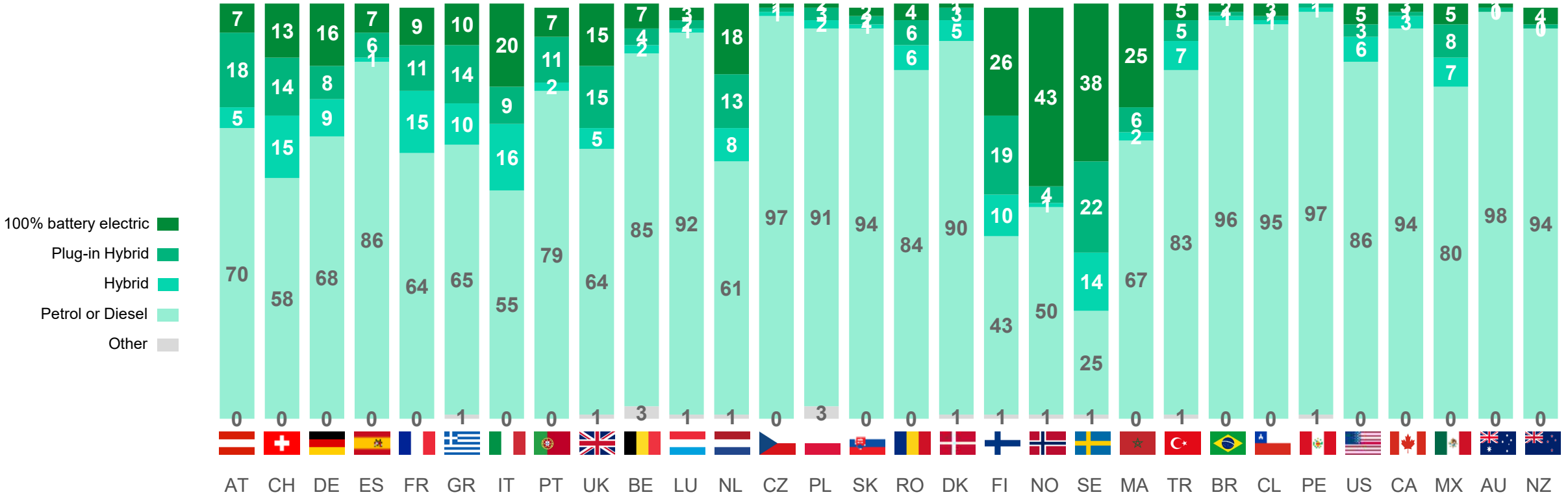
EXPECTED FLEET SHARE PER ENERGY

In %

Light trucks

HOW TO READ THE RESULTS ?

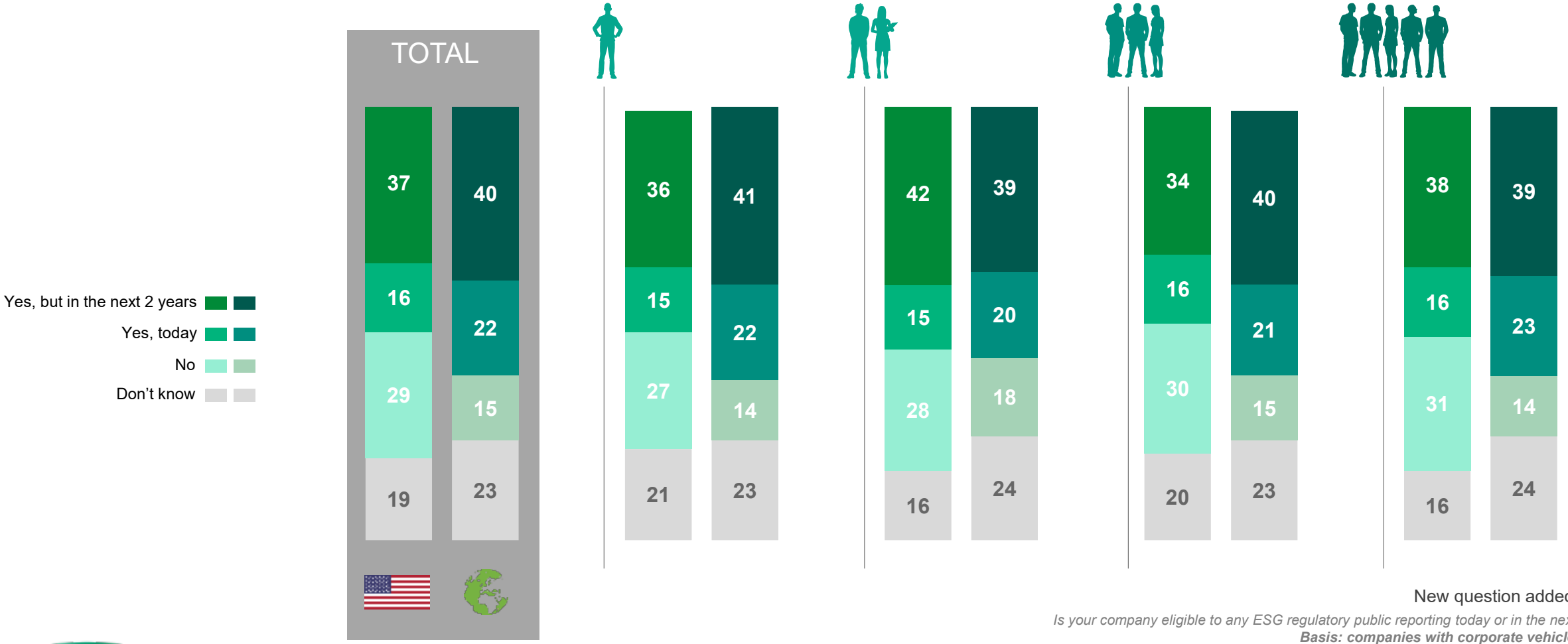
In USA in 3 years, 5% of the light commercial vehicle fleet is expected to be 100% BEV.



In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with Light trucks

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %



New question added in 2024

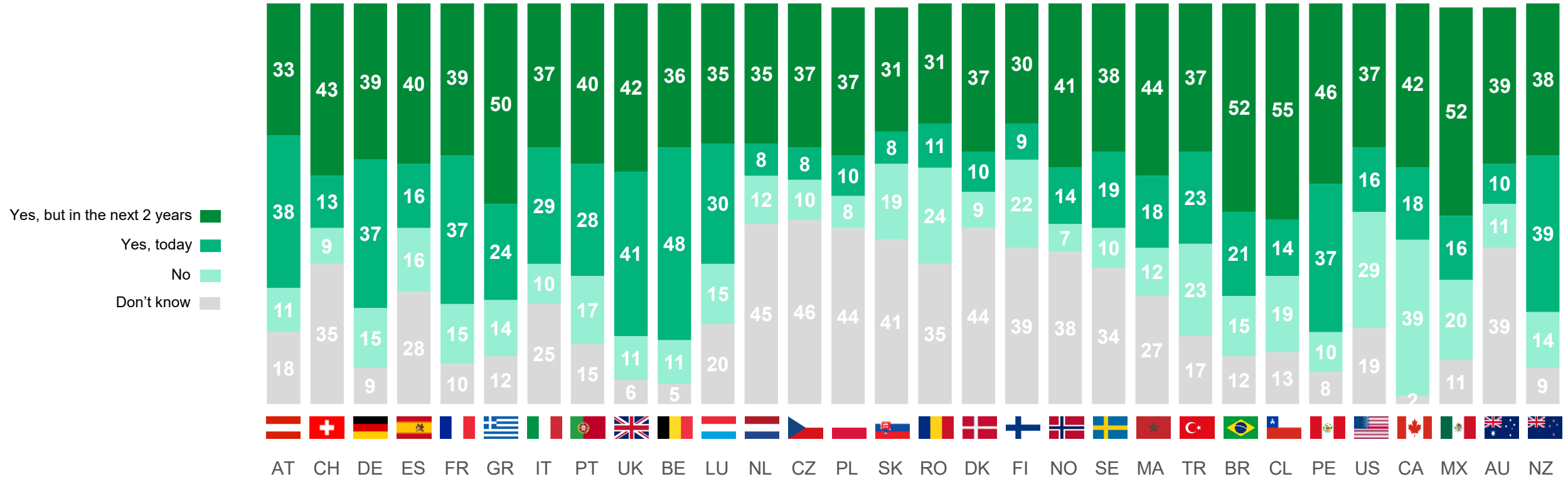
Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
Basis: companies with corporate vehicles = 100%

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ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

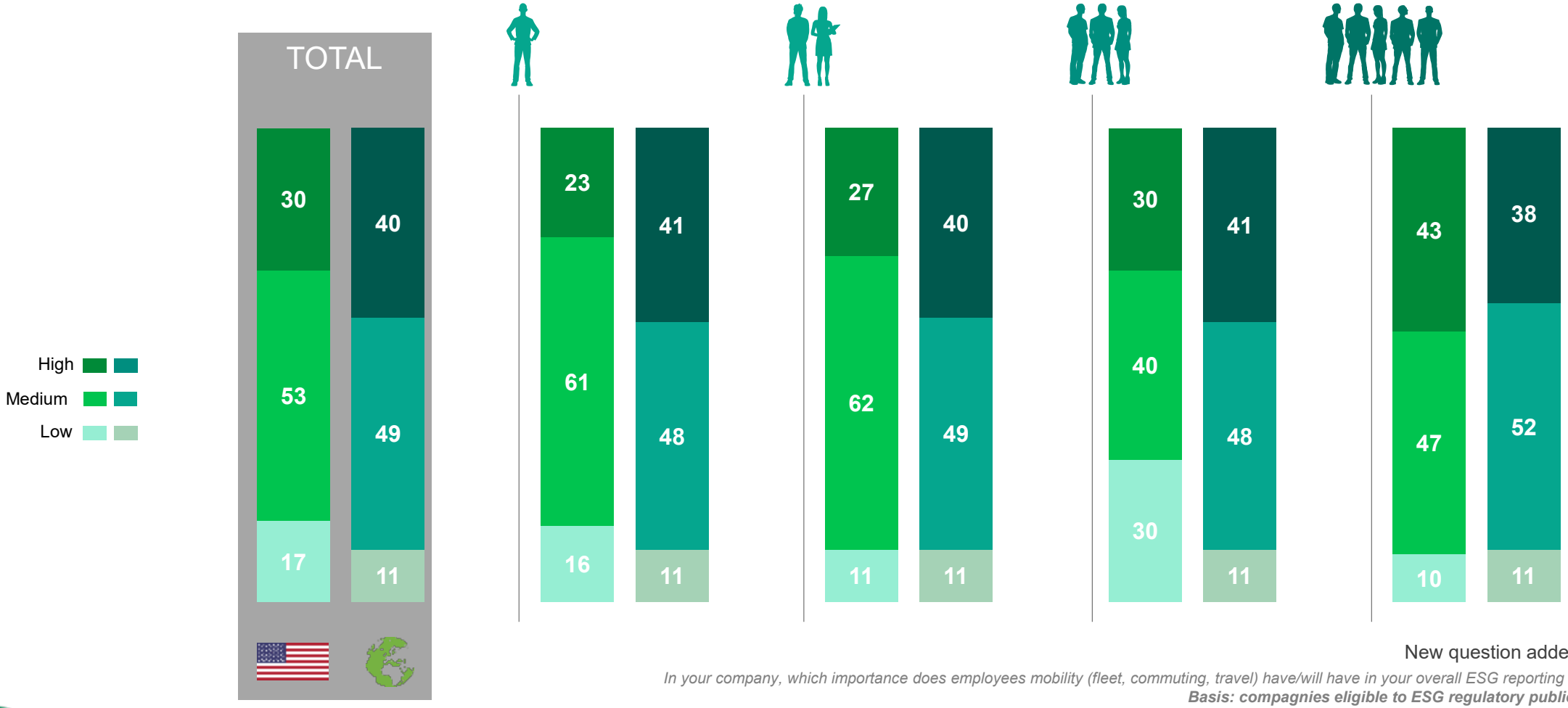


New question added in 2024

Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %



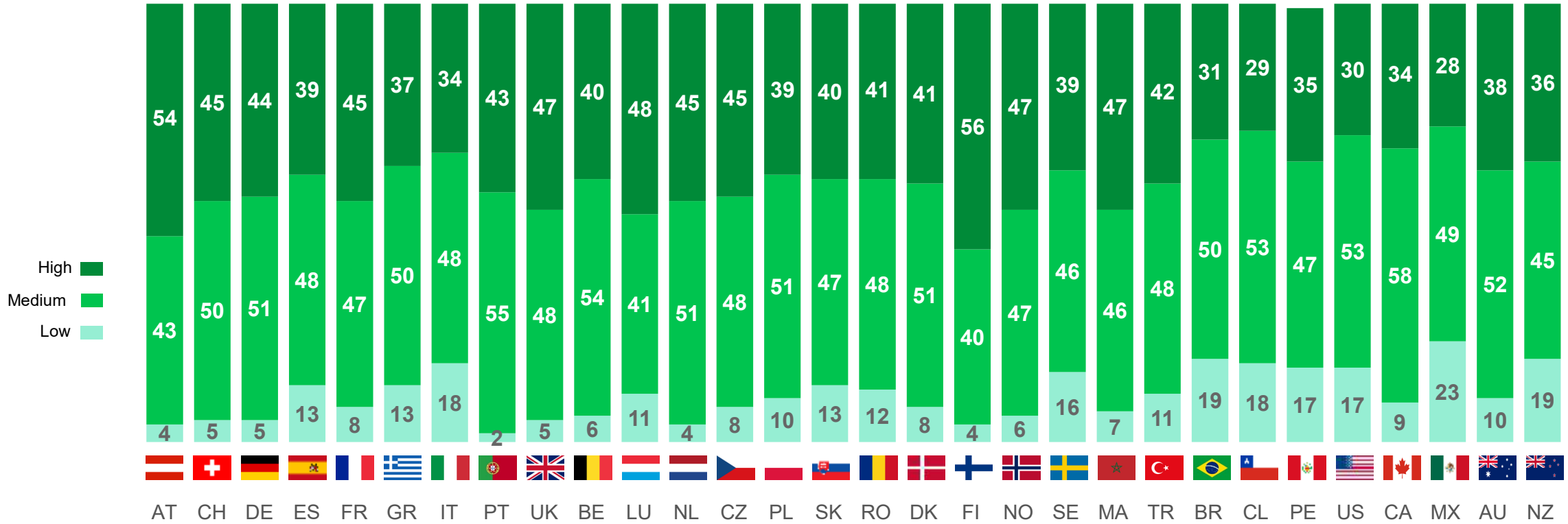
New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?

Basis: compagnies eligible to ESG regulatory public reporting

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %



New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?

Basis: compagnies eligible to ESG regulatory public reporting

5

ENERGY MIX
FOCUS PER ALTERNATIVE TECHNOLOGY



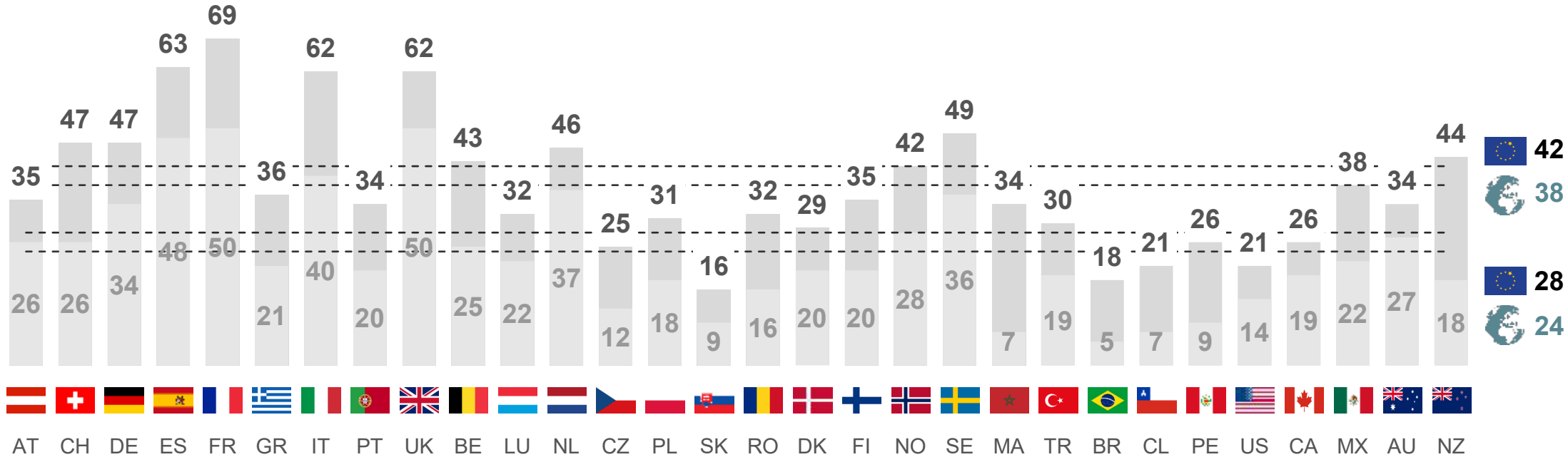
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

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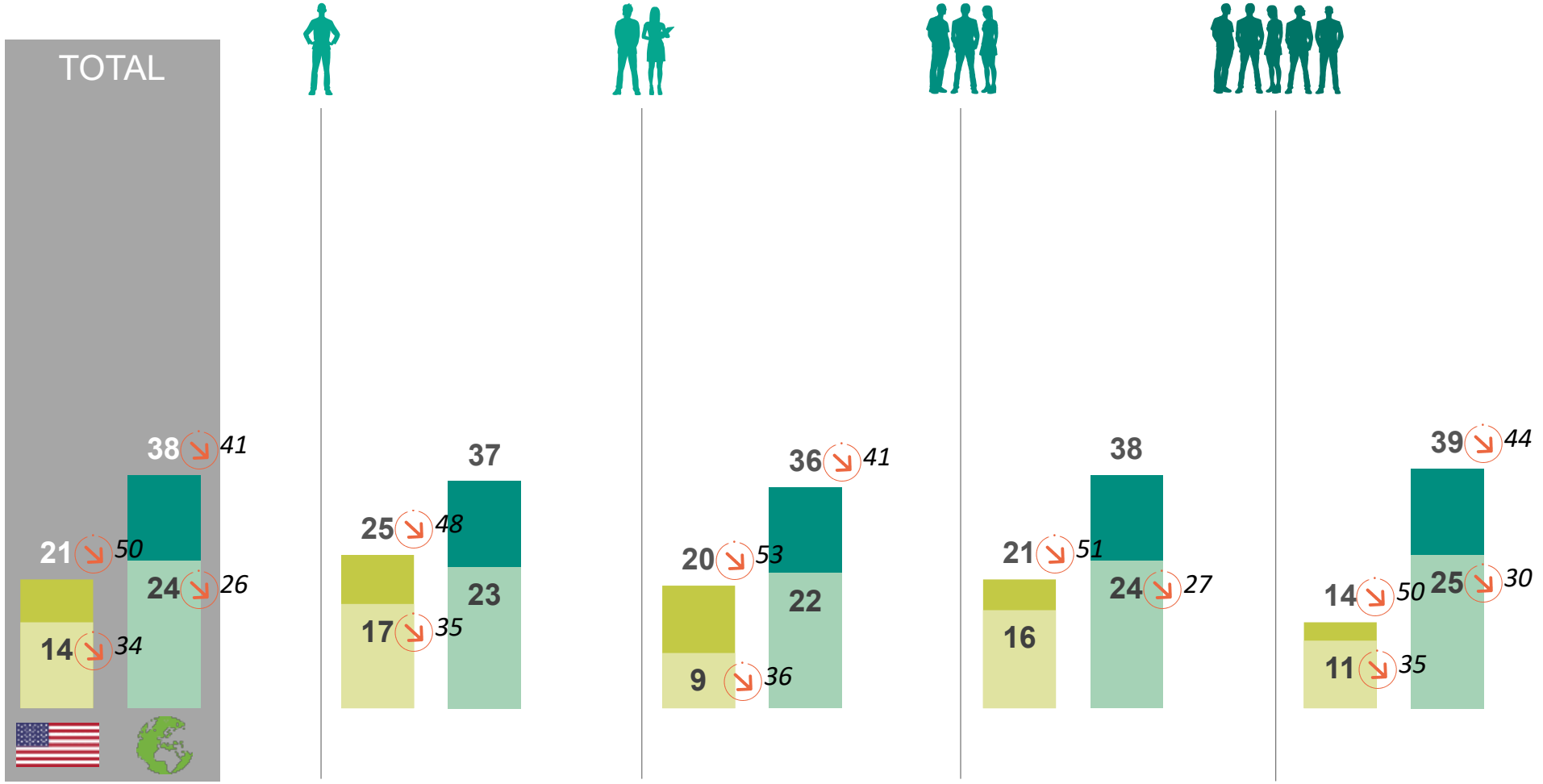
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

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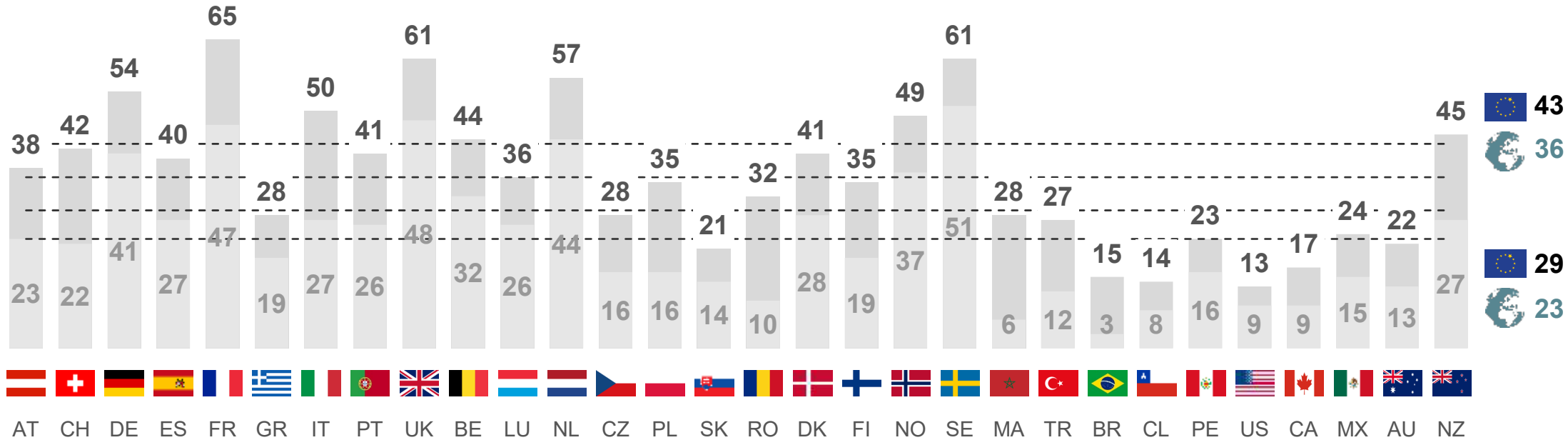
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

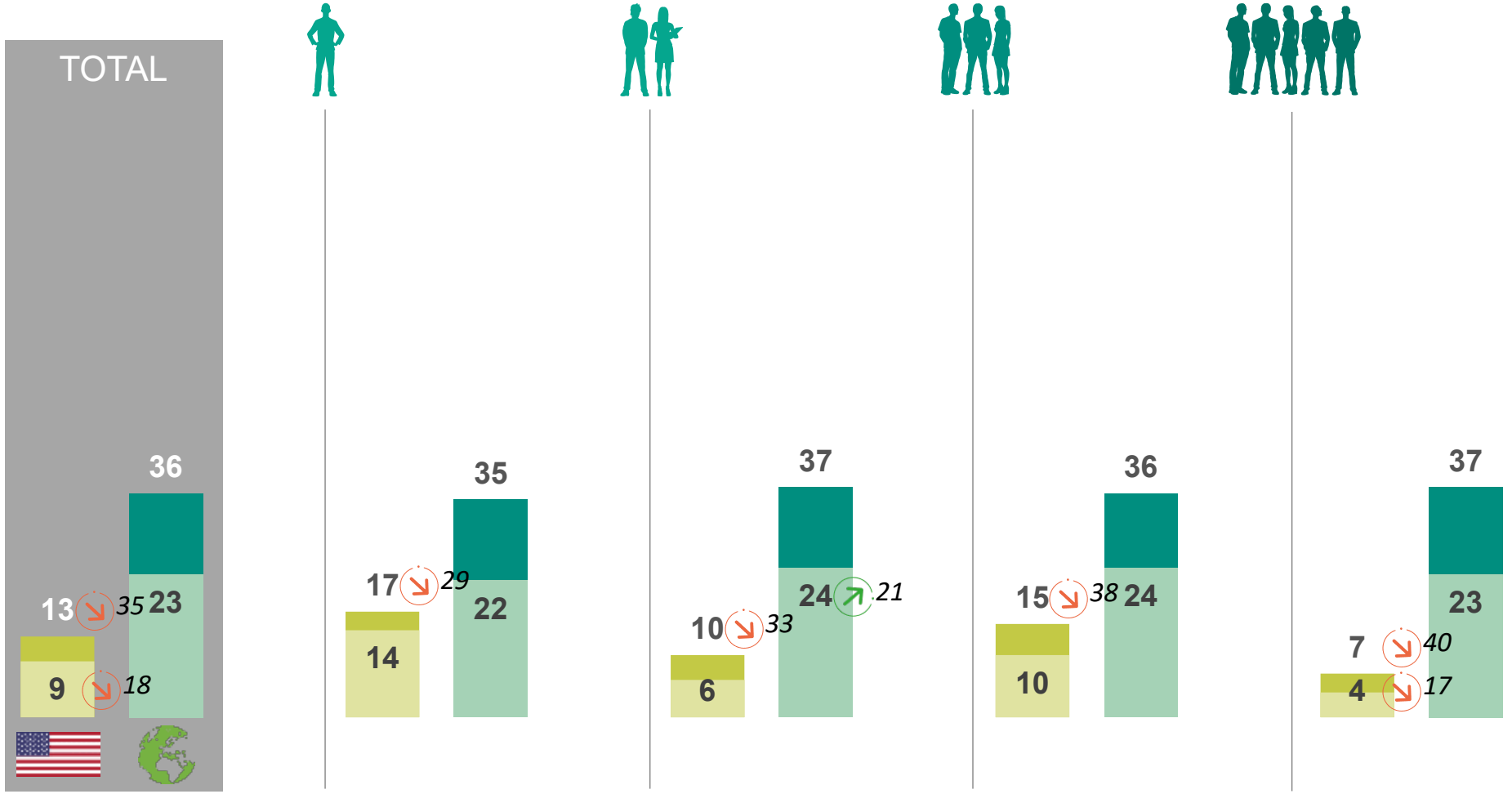
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

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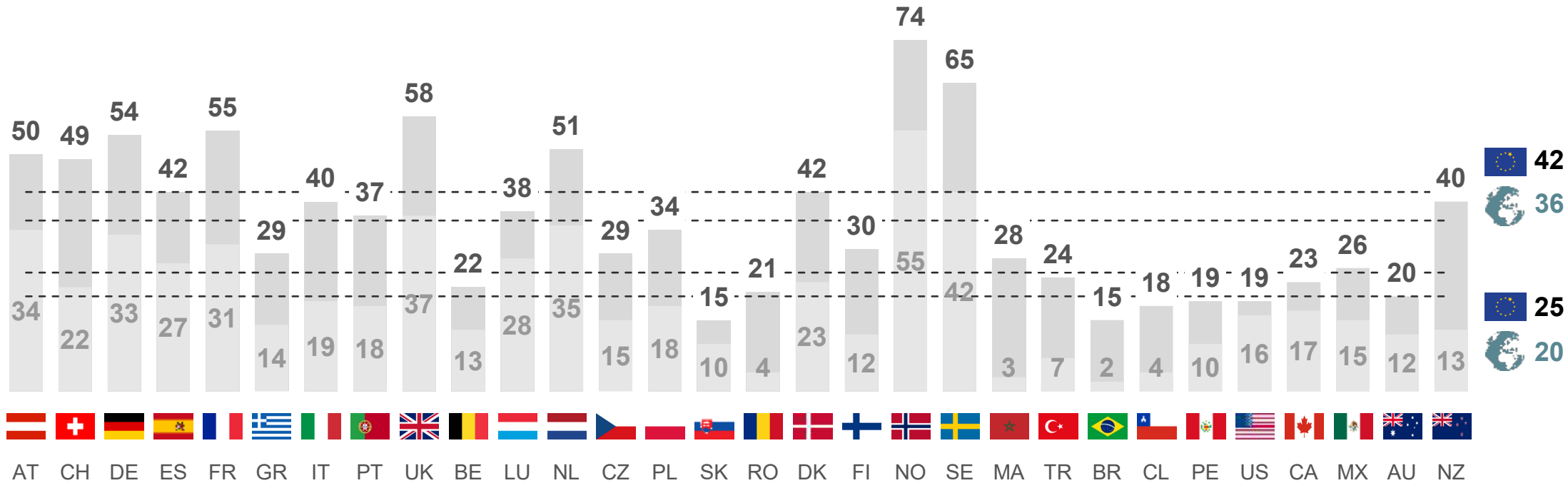
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

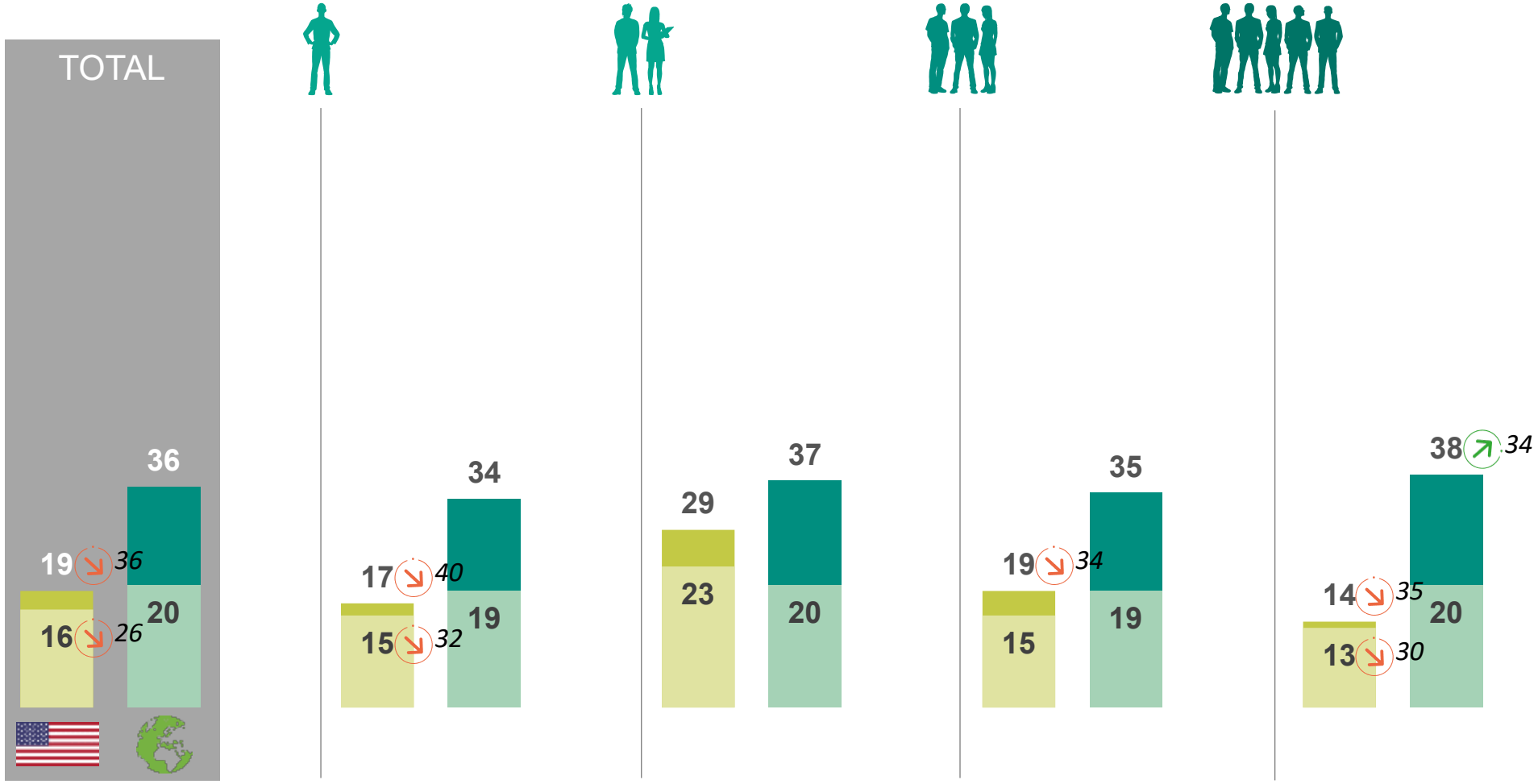
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

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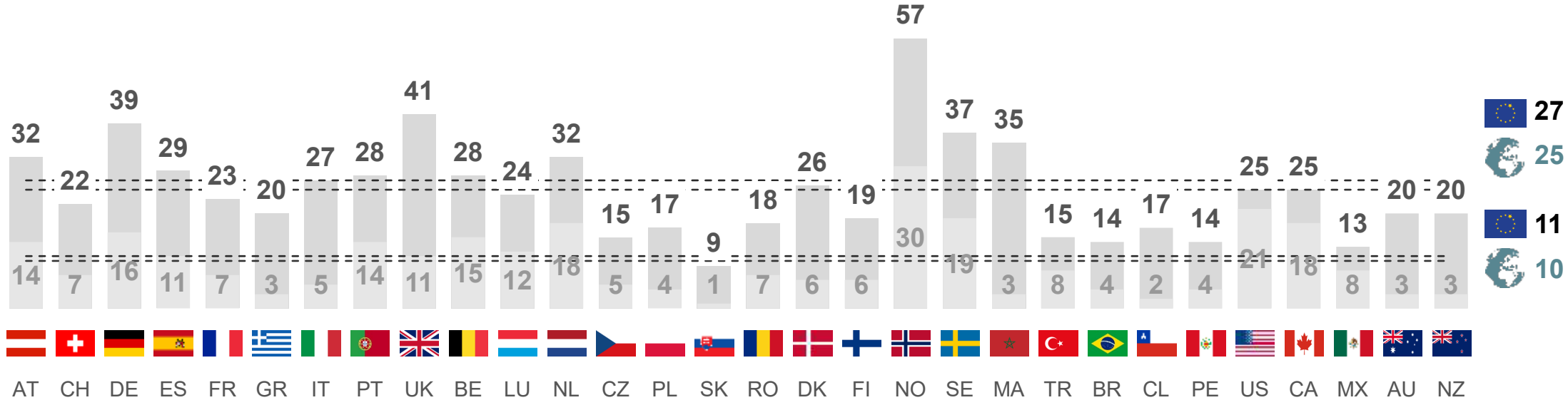
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

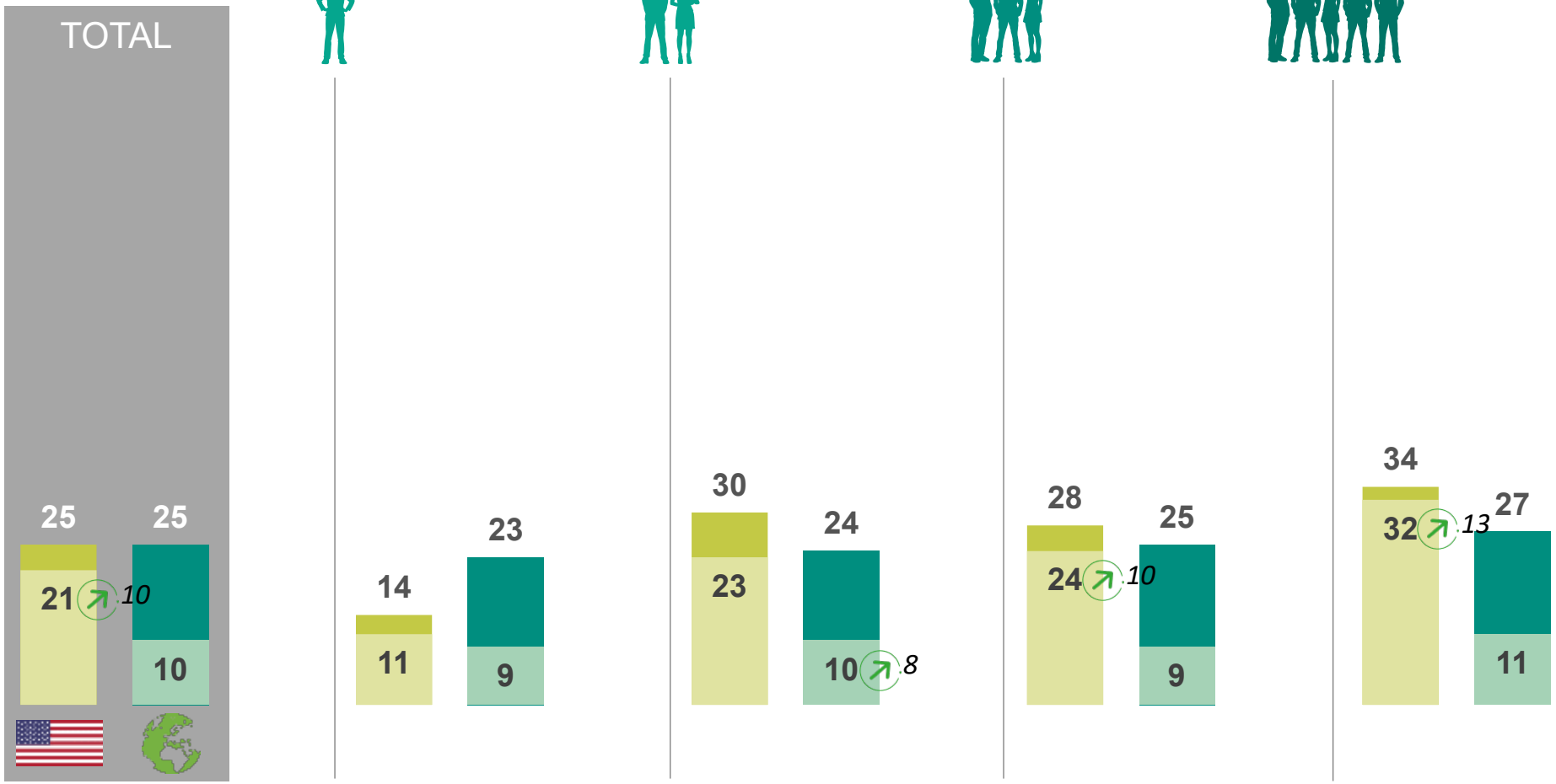
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Light trucks

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

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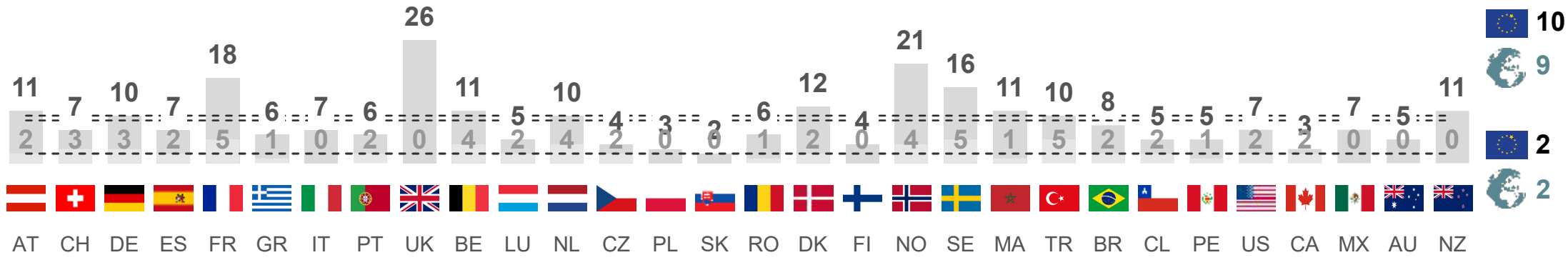
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Light trucks

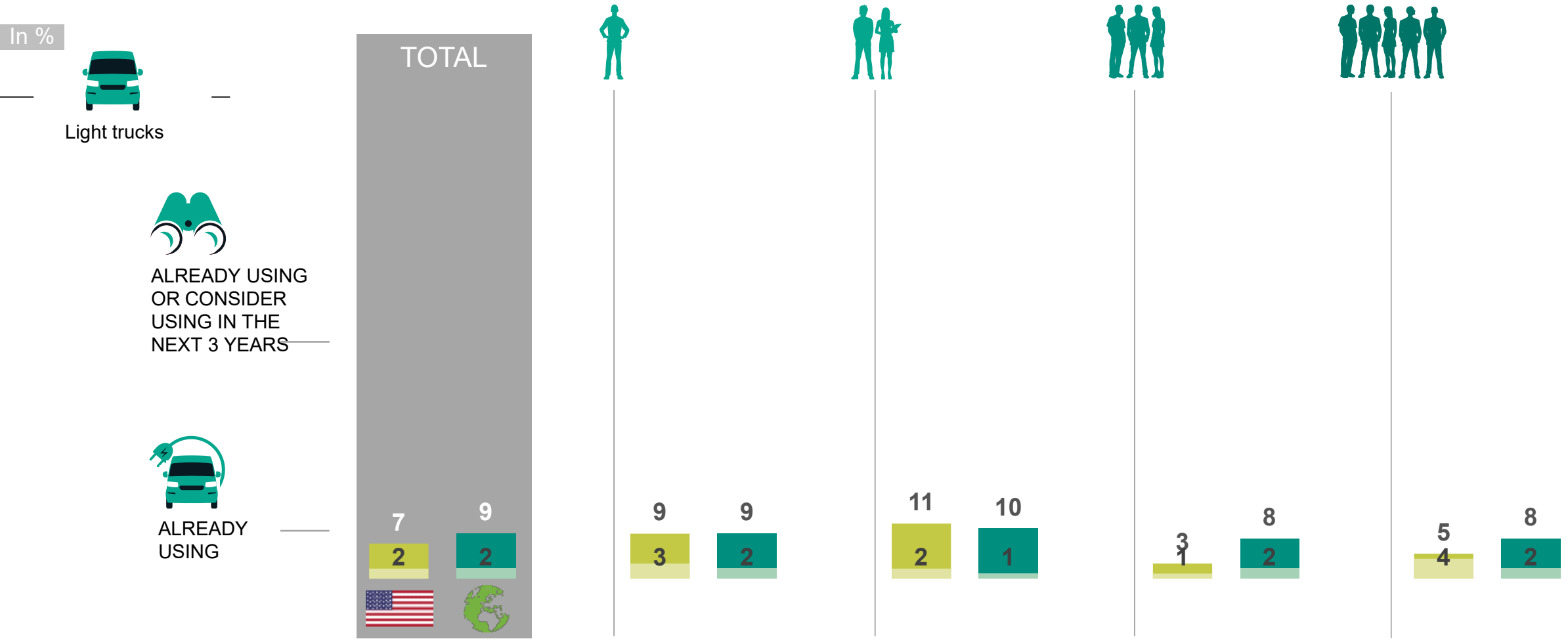
ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

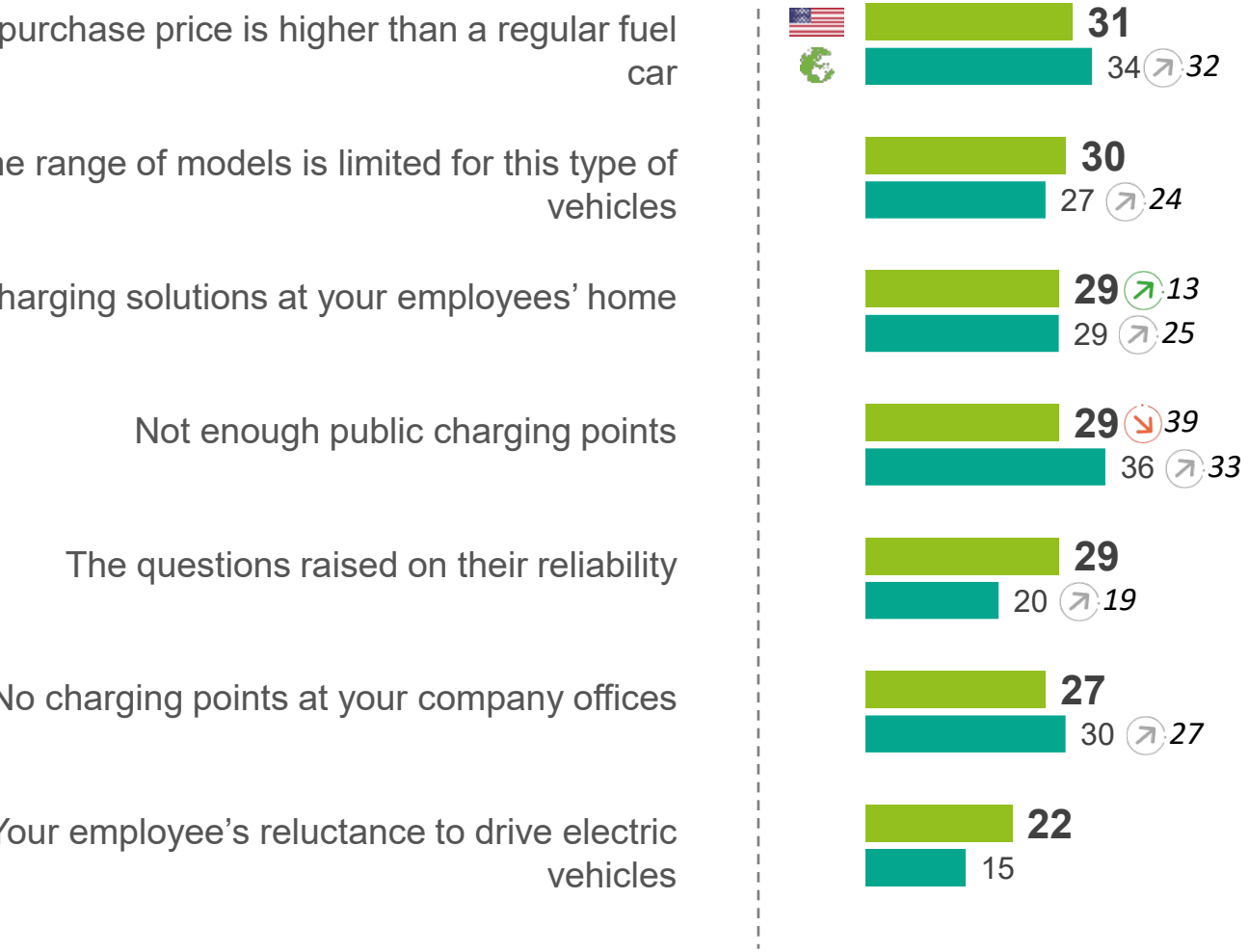


Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + Light trucks

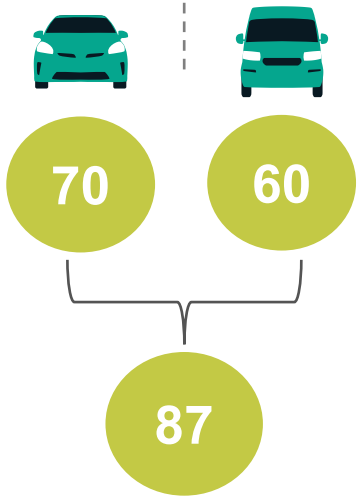


What are the constraints of using 100% Battery Electric vehicles?
Basis: Know 100% BEV technology

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + Light trucks do not consider implementing battery electric vehicles



No charging solutions at your employees' home	31 (↗ 11) / 29 (↗ 25)
The purchase price is higher than a regular fuel car	31 / 35
The questions raised on their reliability	30 / 21
The range of models is limited for this type of vehicles	29 / 28
No charging points at your company offices	28 / 31 (↗ 29)
Not enough public charging points	27 (↘ 38) / 35
Your employee's reluctance to drive electric vehicles	22 / 16

What are the constraints of using 100% Battery Electric vehicles?
Basis: Not considering implementing 100% BEV technology

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MAIN REASONS TO START ORDERING MORE BEVS

In %

Passenger cars + Light trucks



	TOTAL				
More brands and models of BEVs are available on the market	38	32 ↘ 54	50	42	26 ↘ 50
TCO	37 ↘ 53	36	29	44	36
Governmental subsidies for BEVs are offered in a more generous way	34	28	41	35	35
Tax reliefs for BEVs users are introduced	34	34	38	27	39
There are more public charging points available and spread across the country	32	28	43	33	26
Environmental impact of using BEVs is more significant	30 ↘ 57	32 ↘ 54	24	33 ↘ 59	29 ↘ 70
The range of BEVs is higher	29 ↘ 49	40	19 ↘ 56	31	19 ↘ 50

What would be the main reasons for your company to start ordering more BEVs (battery electric vehicles)?
Basis: consider implementing alternative fuel technologies

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ACCESS TO CHARGING POINTS

In %

Passenger cars + Light trucks

	TOTAL			
Charging points are planned to be installed at the company premises in the next 12 months	31 / 30	34 / 30	24 / 29	24 / 31	42 / 29
Currently no charging points installed at the company premises	29 / 47 ↗42	30 / 47 ↗42	27 / 47 ↗43	32 / 47 ↗43	25 / 46 ↗40
Charging points installed at the company premises and free charging for drivers	29 / 13 ↘15	23 / 12 ↘15	33 / 14	27 / 12	32 / 13
Company subsidises cost of home installations of charging points for drivers	28 ↗17 / 20 ↗16	18 / 19	27 / 21 ↗14	33 / 19 ↗16	36 / 21
Drivers have to pay for home installation of charging points	22 / 26	28 / 25	24 / 25	24 / 26	11 / 27
Charging points installed at the company premises and drivers charged for charging	20 ↗4 / 7	21 / 7	12 / 7	16 ↗0 / 6	32 / 6

Multiple answers - % don't add up to 100%

In terms of charging point installation and responsibility for the cost of charging for battery electric and plug-in hybrid vehicles in your company...?

Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for Light trucks

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EQUIPMENT IN CHARGING POINTS

In %



Passenger cars + Light trucks






	Already equipped	Already equipped or consider
Your company premises	10	54
Your employees` homes	8	51
Your company premises	9	41
Your employees` homes	7	48
Your company premises	15	62
Your employees` homes	8	52
Your company premises	9	60
Your employees` homes	9	49
Your company premises	9	57
Your employees` homes	9	56

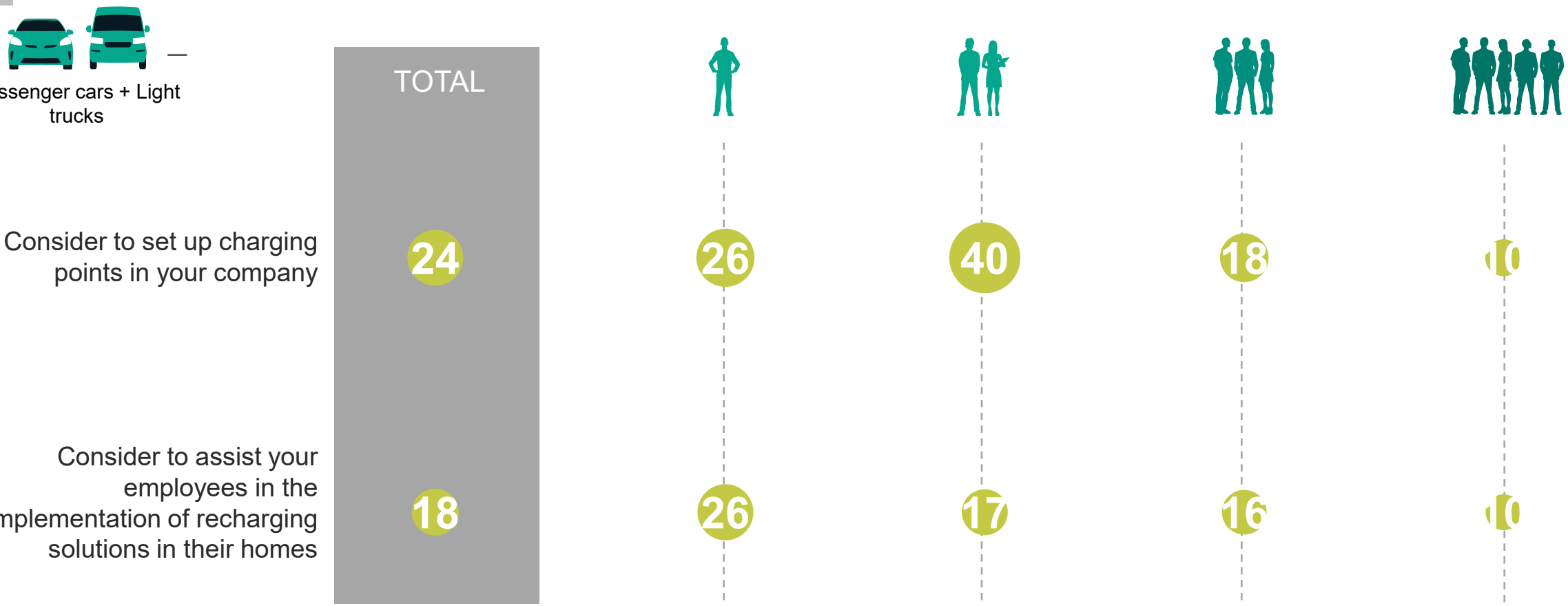
Have you already equipped or are you considering to equip in the next 12 months the following premises with the charging points?
Basis: companies with corporate vehicles = 100%

COMPANY'S STRATEGY TOWARDS PROVIDING CHARGING POINTS

Among companies that already own or consider 100% Battery Electric Vehicle

In %

Passenger cars + Light trucks



Concerning the charging of your Electric Vehicles batteries, do you consider….
Basis: already own or consider 100% Battery Electric Vehicle

6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?





MOBILITY SOLUTIONS

TOP 3 USED SOLUTIONS

		US		EU
#1	Car or cash allowance	7%	26	17%
#2	Corporate car sharing: where an employee can make a vehicle reservation via an external solution	7%		12%
#3	Private lease/Salary sacrifice	5%	17	13%

TOP 3 POTENTIAL NEXT 3 YEARS

		US		EU
#1	Mobility Budget: a predefined budget provided by the company that allows employees to choose their mode of transport.	20%		28%
#2	A short or mid term rental vehicle to provide mobility for an employee	19%	40	27%
#3	Public transport	18%		31%

A LOW LEVEL OF ADOPTION OF MOBILITY SOLUTIONS

1. **1 out of 4 companies have adopted mobility solutions** to date, quite below the 75% global average. >1000 employees companies are somehow less concerned (19%).

   Cash or car allowance and corporate car sharing are the most adopted solutions but to a still low extent (7% for both). They are all seen as add-ons to corporate vehicles, these being essential business transport tools for most companies.

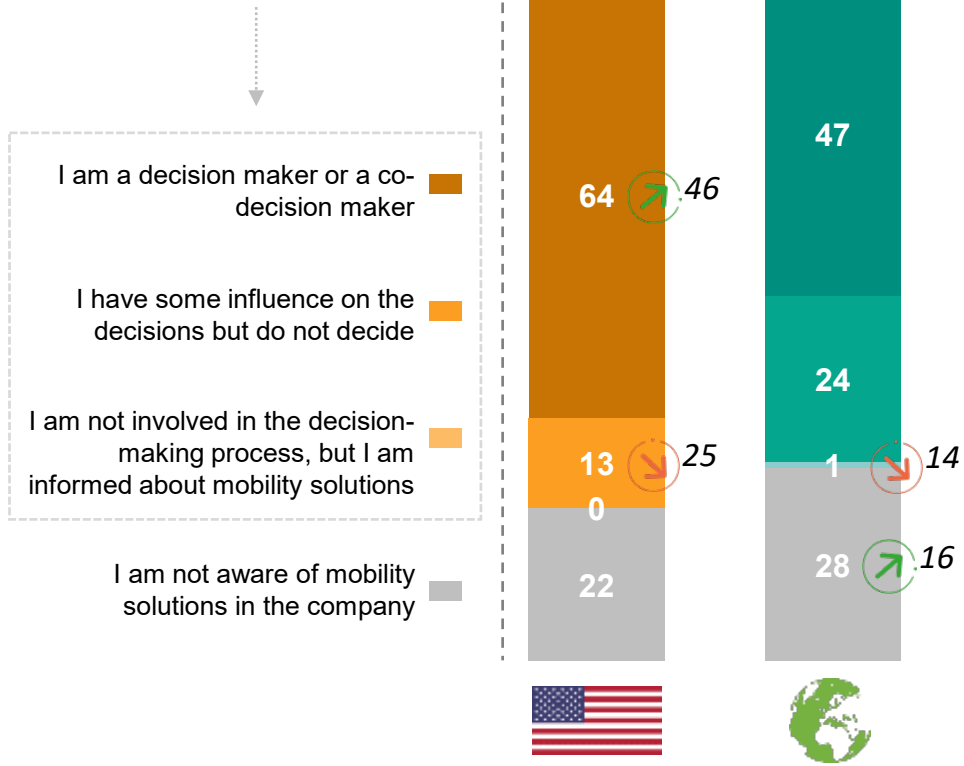
2. **Employees' mobility is perceived as a strategic factor for 1 company out of 4**, with no difference based on the size of the companies.

3. At last, the **half of the US companies have policies in place for cars that are owned by employees but used on business**.

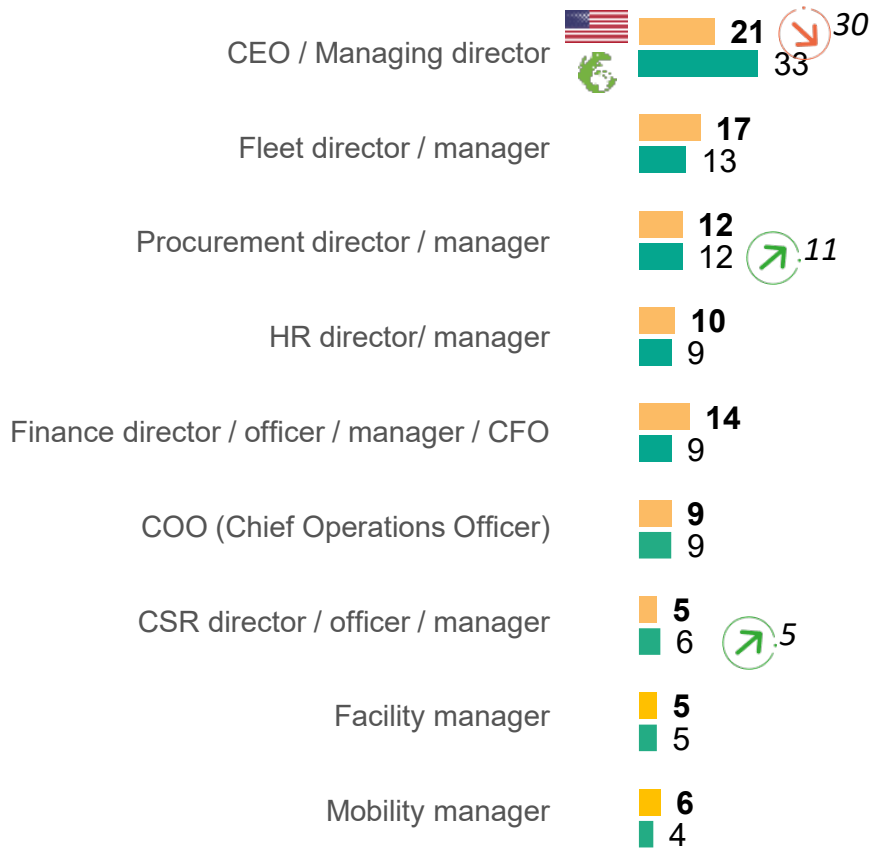
MOBILITY SOLUTION DECISION MAKERS

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

NET ARE AWARE OF MOBILITY SOLUTIONS
(Decision maker, influencer or informed)



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

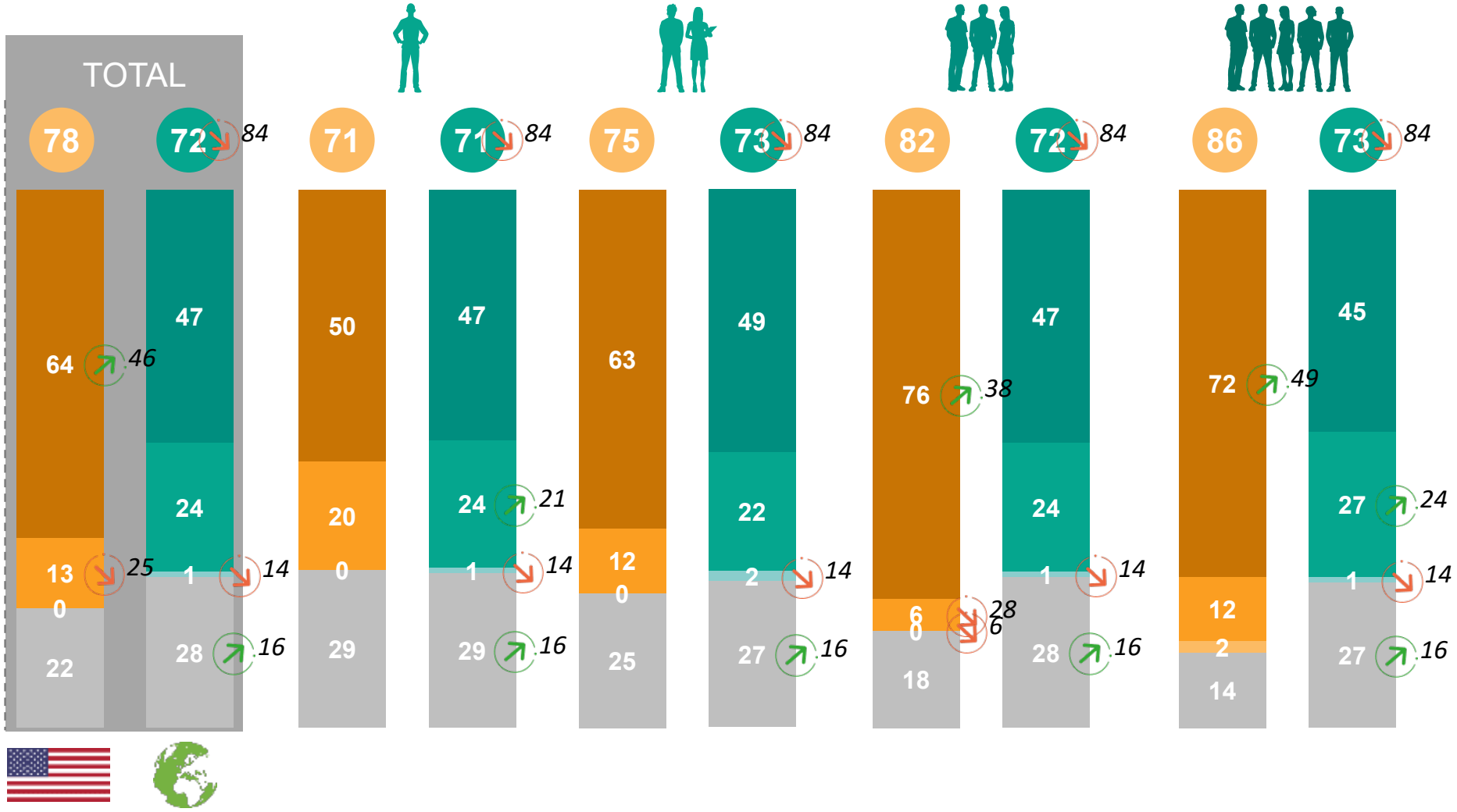


To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

In %

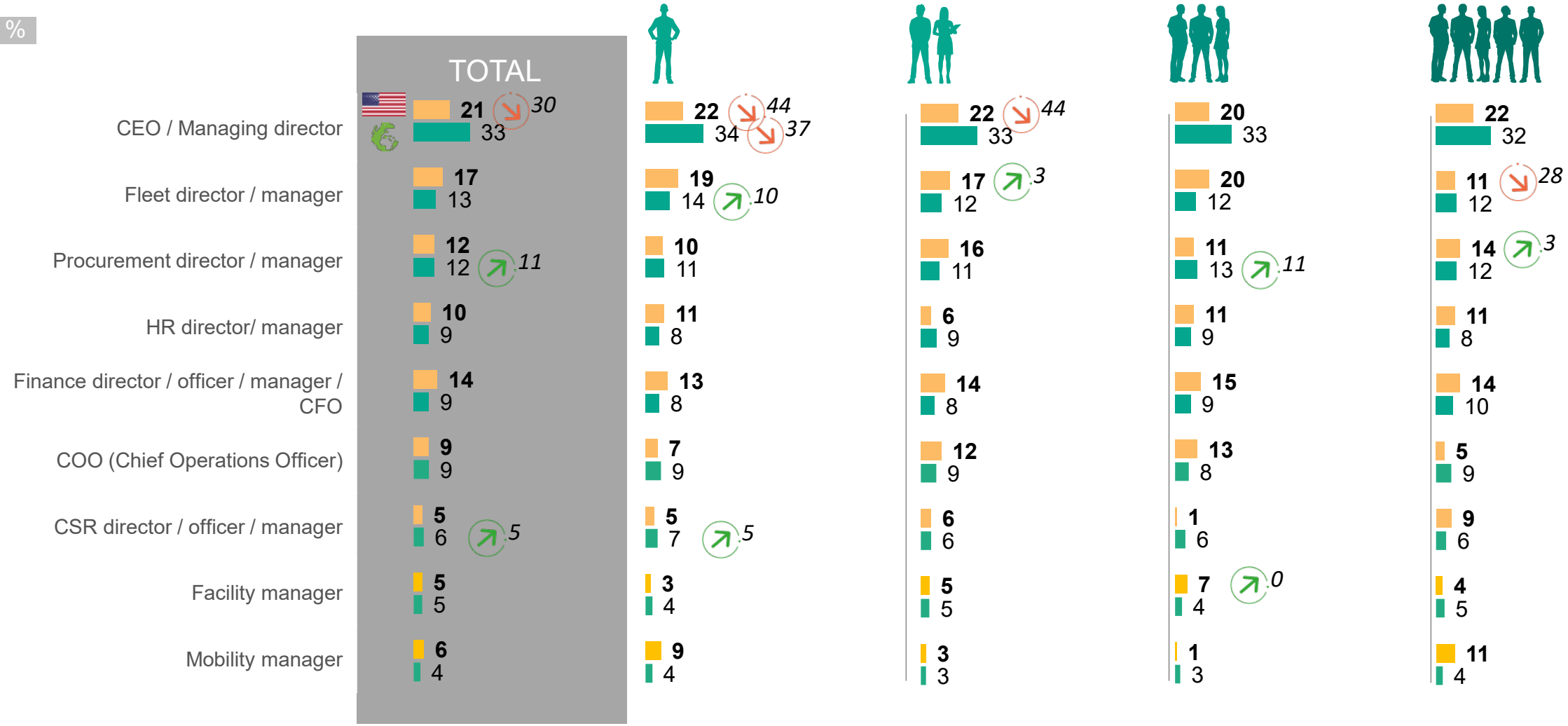
NET ARE AWARE OF MOBILITY SOLUTIONS
(Decision maker, influencer or informed)



To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
Basis: companies with corporate vehicles = 100%

POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

MOBILITY SOLUTIONS LIST AND DEFINITIONS



CORPORATE CAR SHARING:
where an employee can make a vehicle reservation via an external solution



BIKE (OR OTHER TWO WHEELS) SHARING / BIKE (OR OTHER TWO WHEELS) LEASING solution provided by the company



PUBLIC TRANSPORT



MOBILITY BUDGET predefined budget granted by the employer allowing employees to choose their mode of transport



AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



PRIVATE LEASE OR SALARY SACRIFICE (private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer)



A SHORT OR MID TERM RENTAL VEHICLE to provide transport for an employee



CAR OR CASH ALLOWANCE

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ELEMENT-ARVAL GLOBAL ALLIANCE

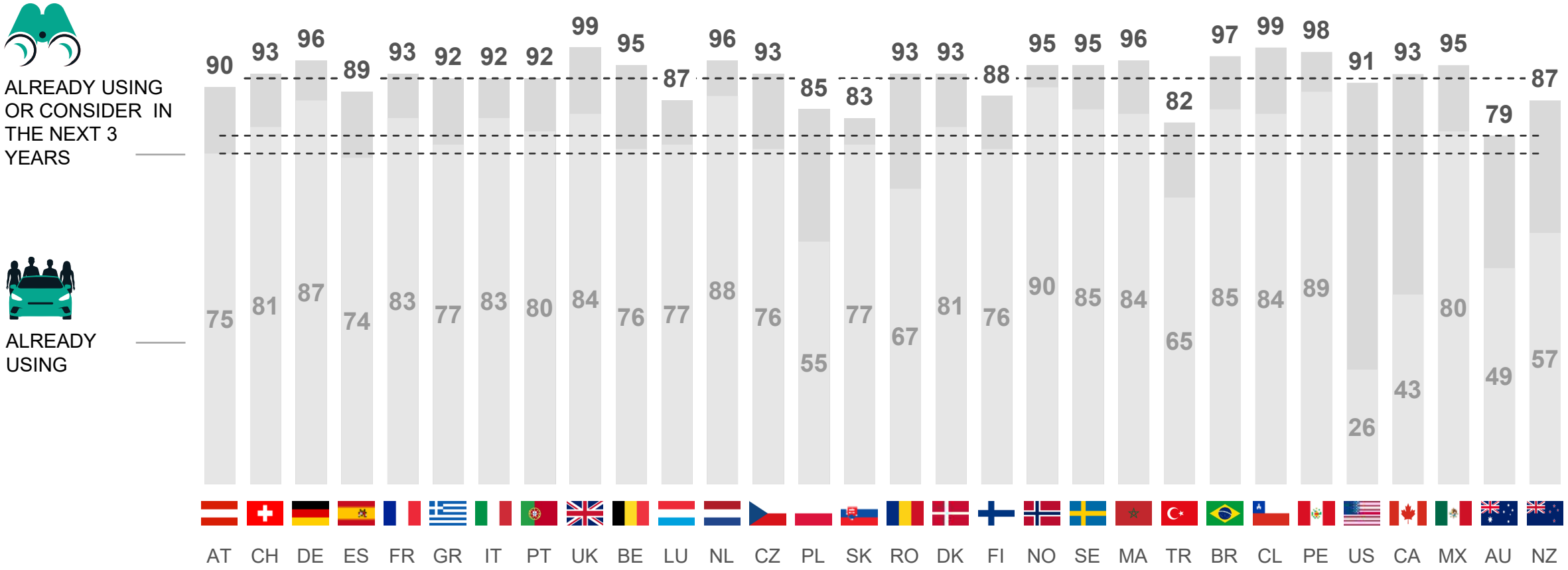
MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

List of the alternative mobility solutions:

- CORPORATE CAR SHARING
- BIKE SHARING / BIKE LEASING
- PUBLIC TRANSPORT
- MOBILITY BUDGET
- AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS
- PRIVATE LEASE OR SALARY SACRIFICE
- A SHORT OR MID TERM RENTAL VEHICLE
- CAR OR CASH ALLOWANCE (except BE)

In %



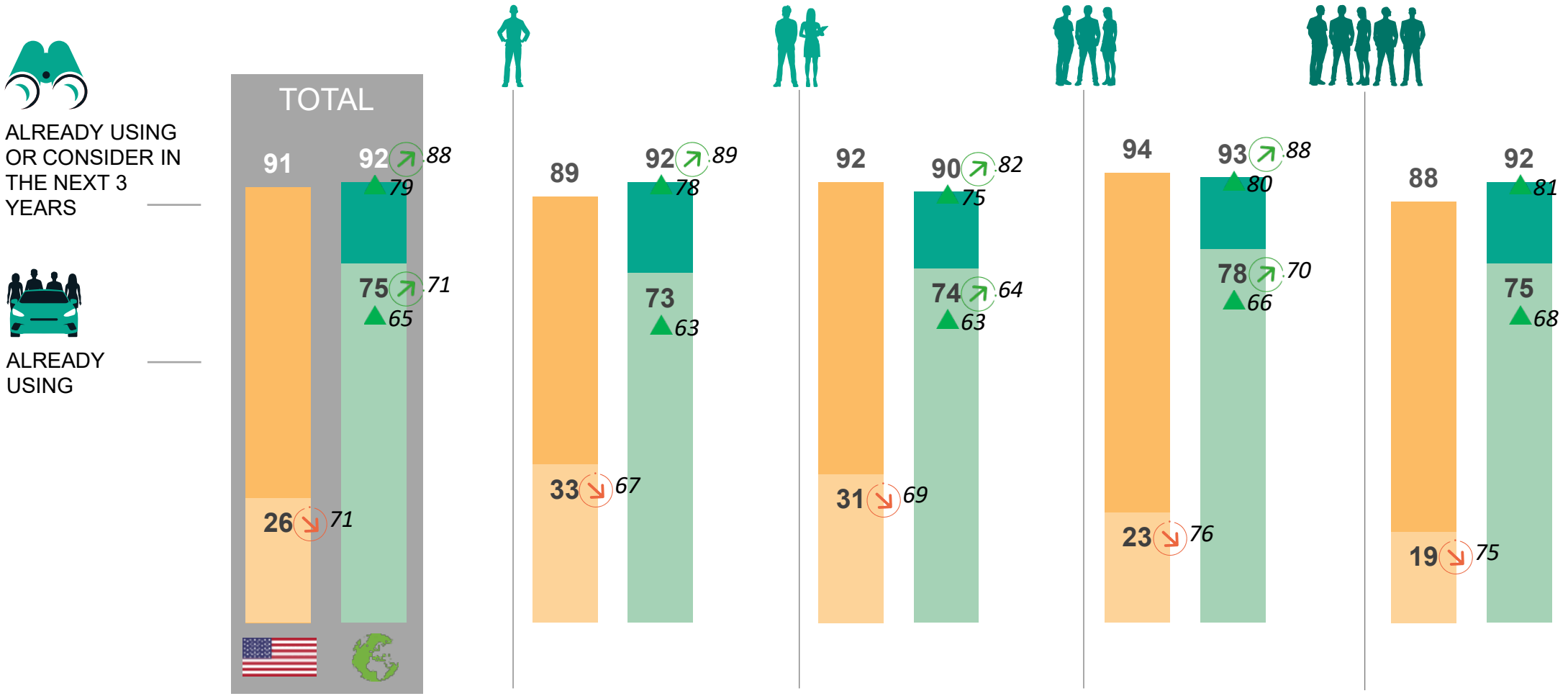
Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %



XX Significantly higher than 2023 year

Significantly higher than 2022 year

XX = score 2023 or 2022

XX Significantly lower than 2023 year

XX Significantly lower than 2022 year

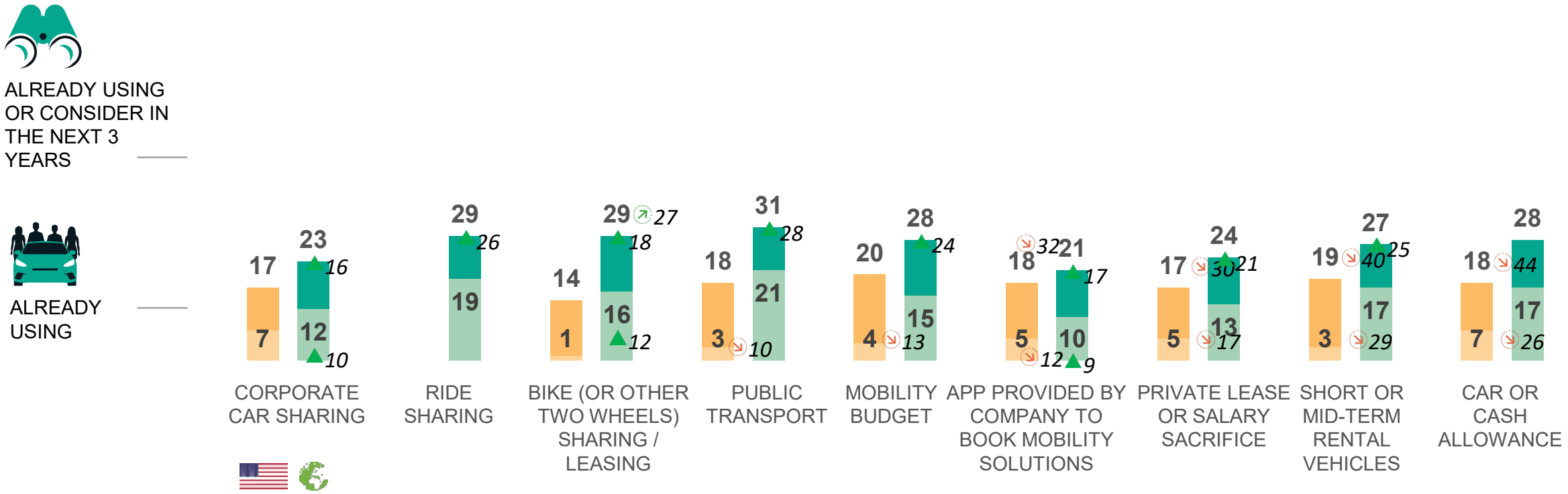
XX = score 2023 or 2022

Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

26% Of companies have already implemented at least one of these solutions



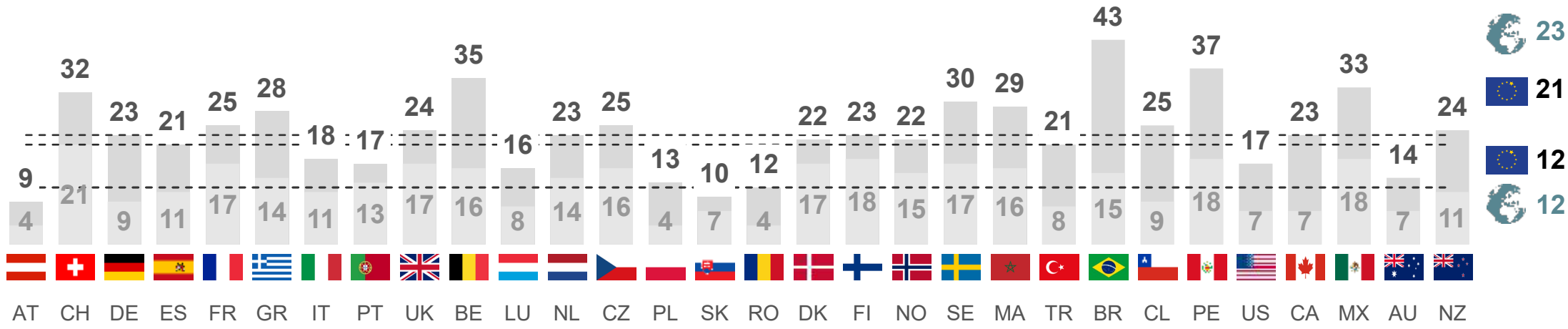
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

CORPORATE CAR SHARING IMPLEMENTATION

In %

ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

ALREADY USING

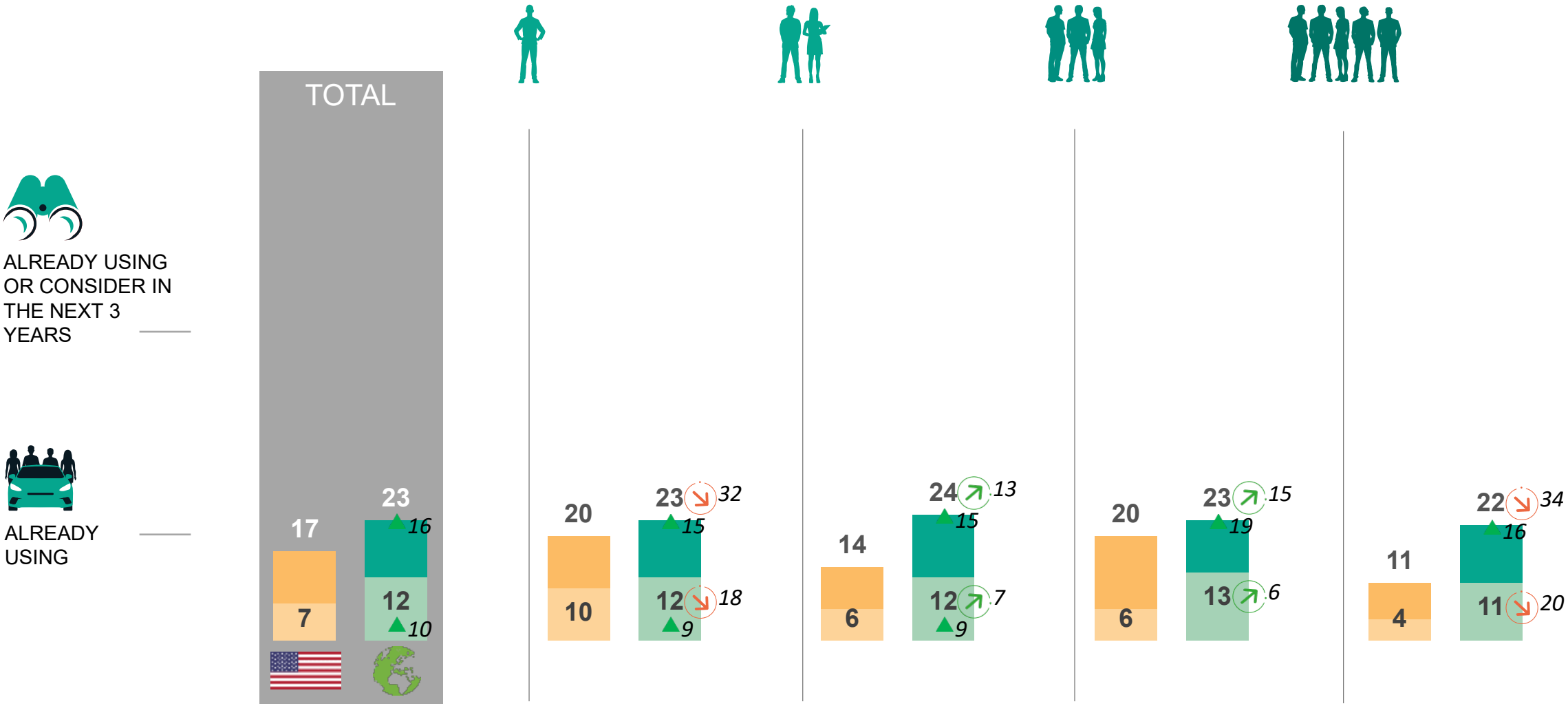


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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CORPORATE CAR SHARING IMPLEMENTATION

In %



Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

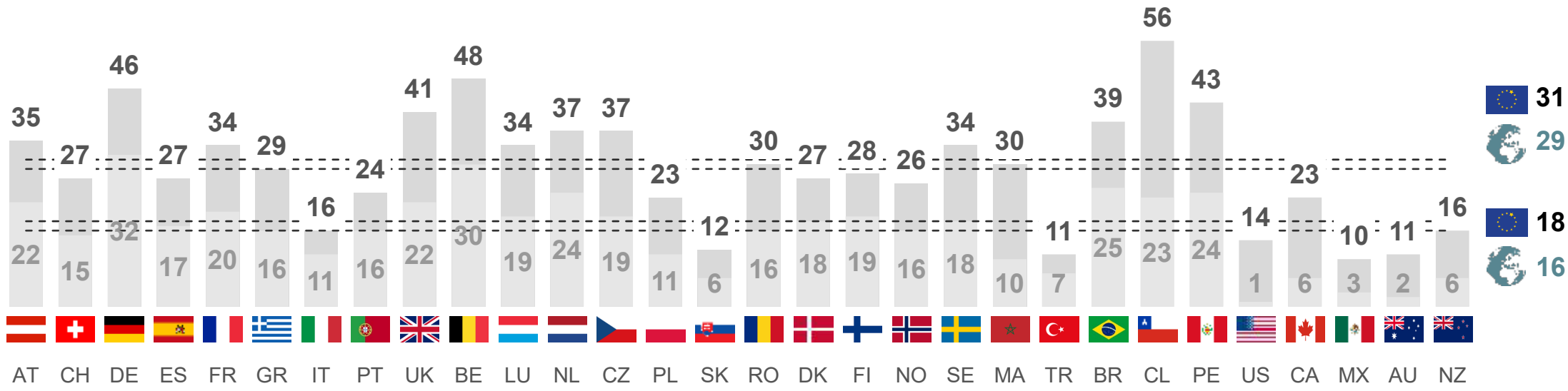
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BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

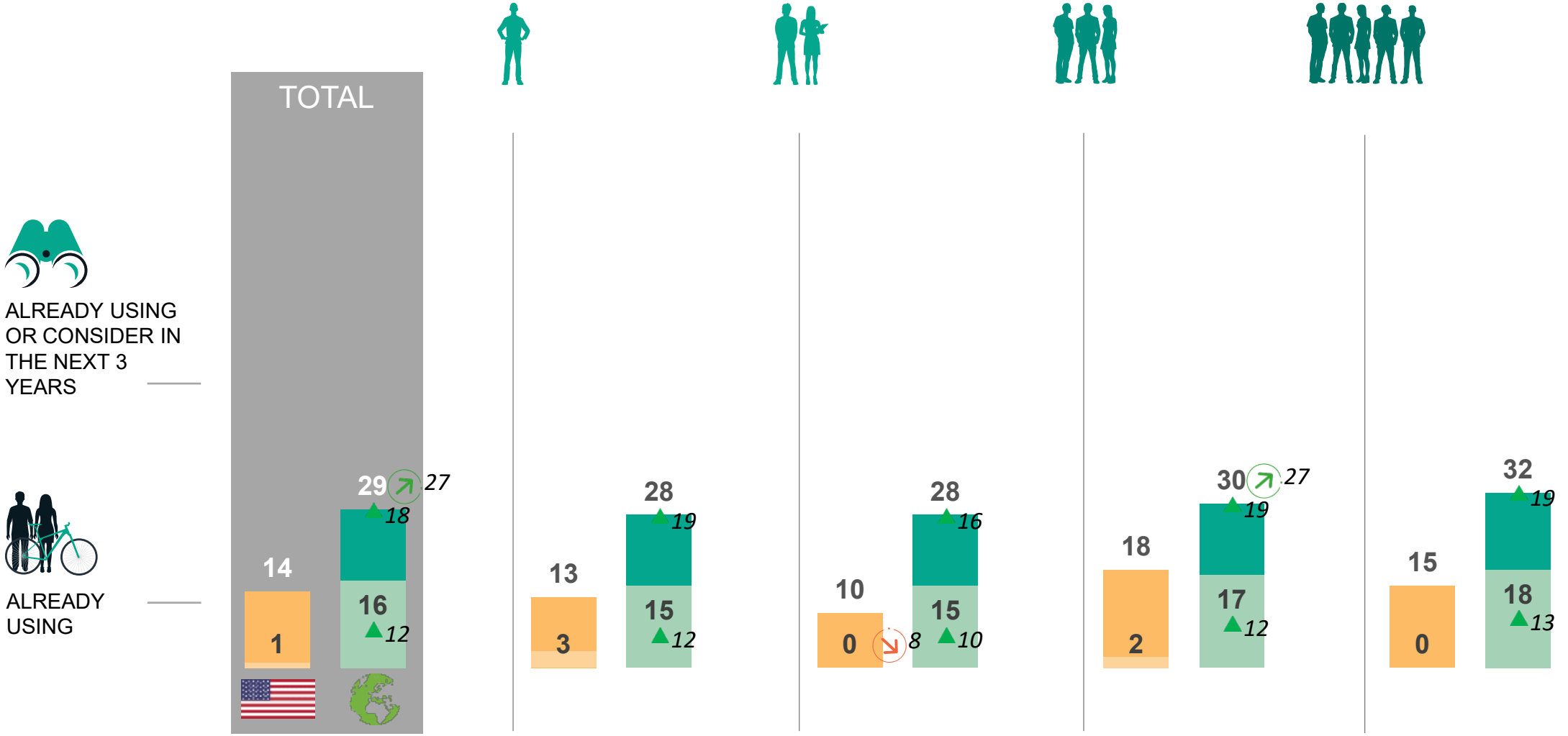
ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %

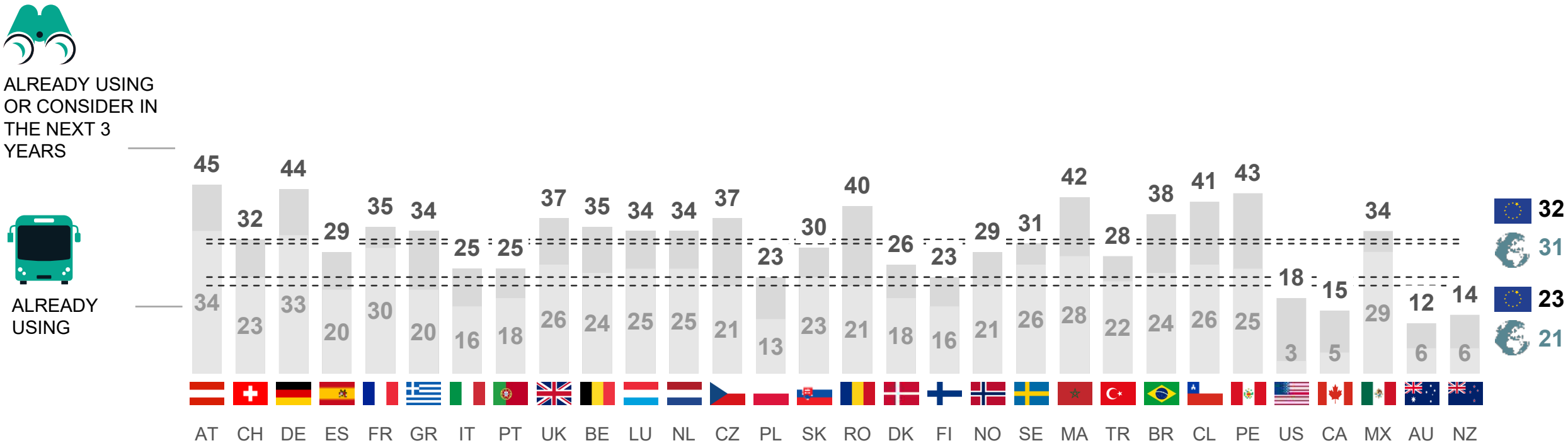


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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PUBLIC TRANSPORT IMPLEMENTATION

In %



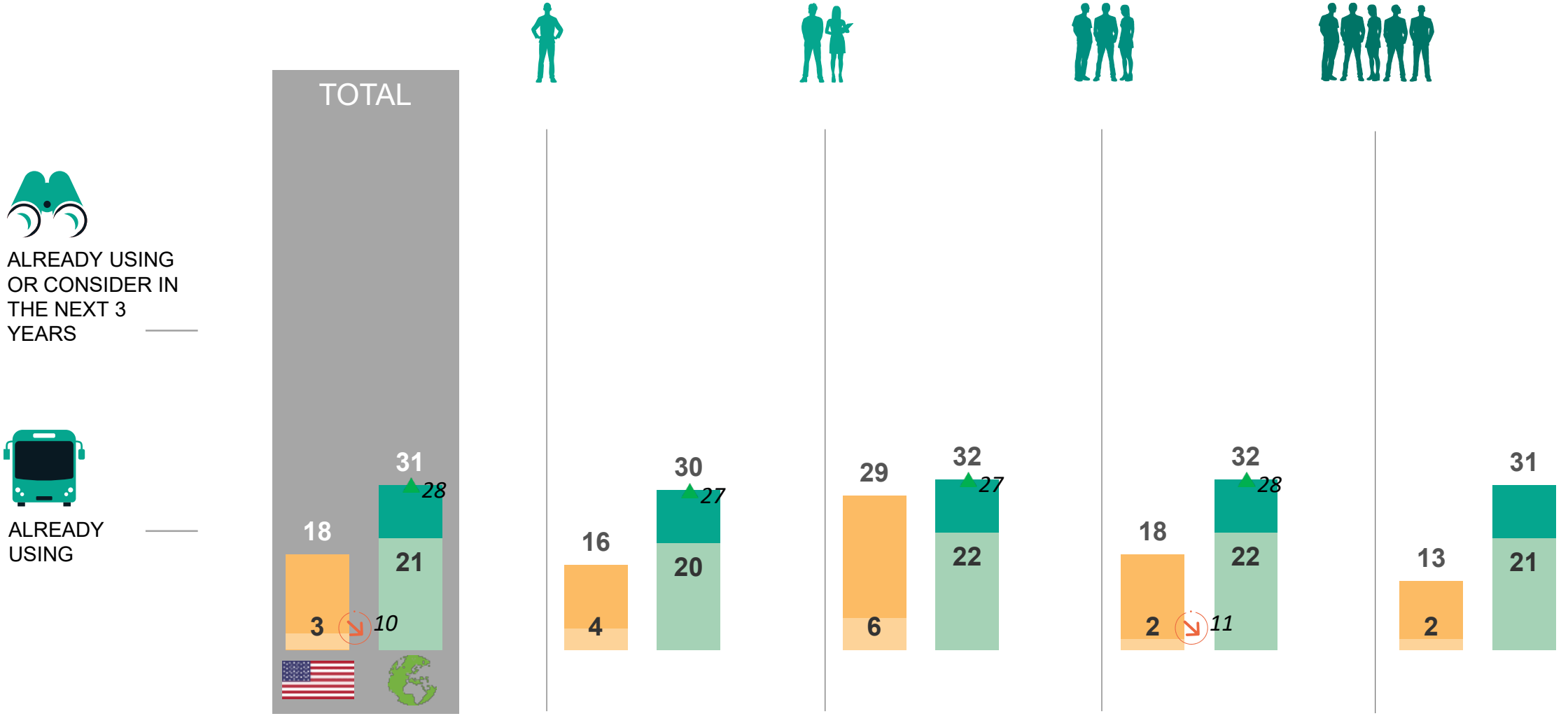
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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PUBLIC TRANSPORT IMPLEMENTATION

In %



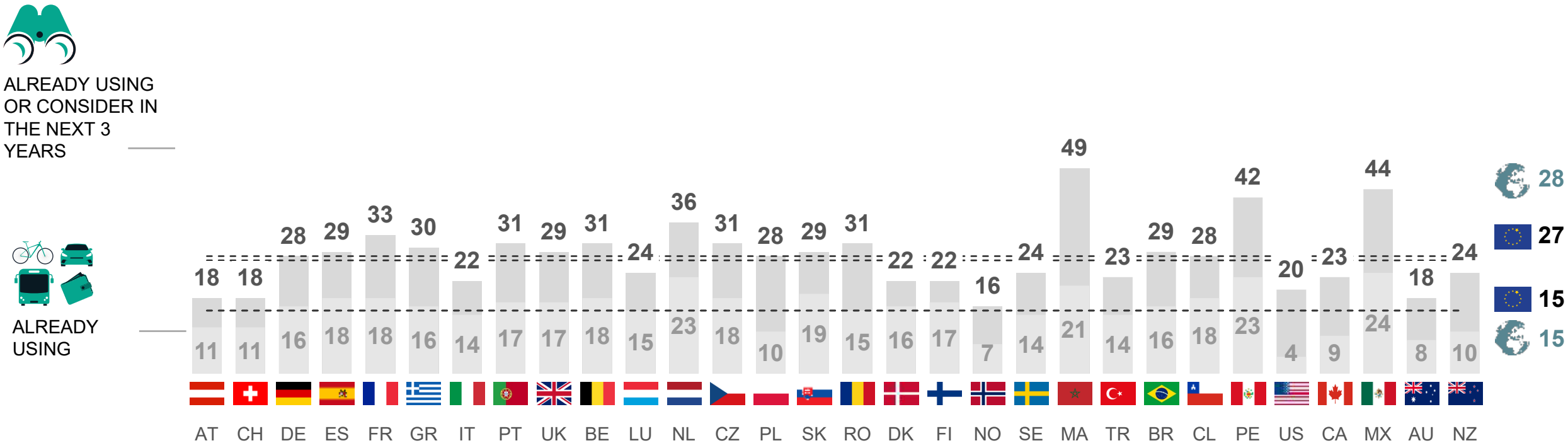
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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MOBILITY BUDGET IMPLEMENTATION

In %

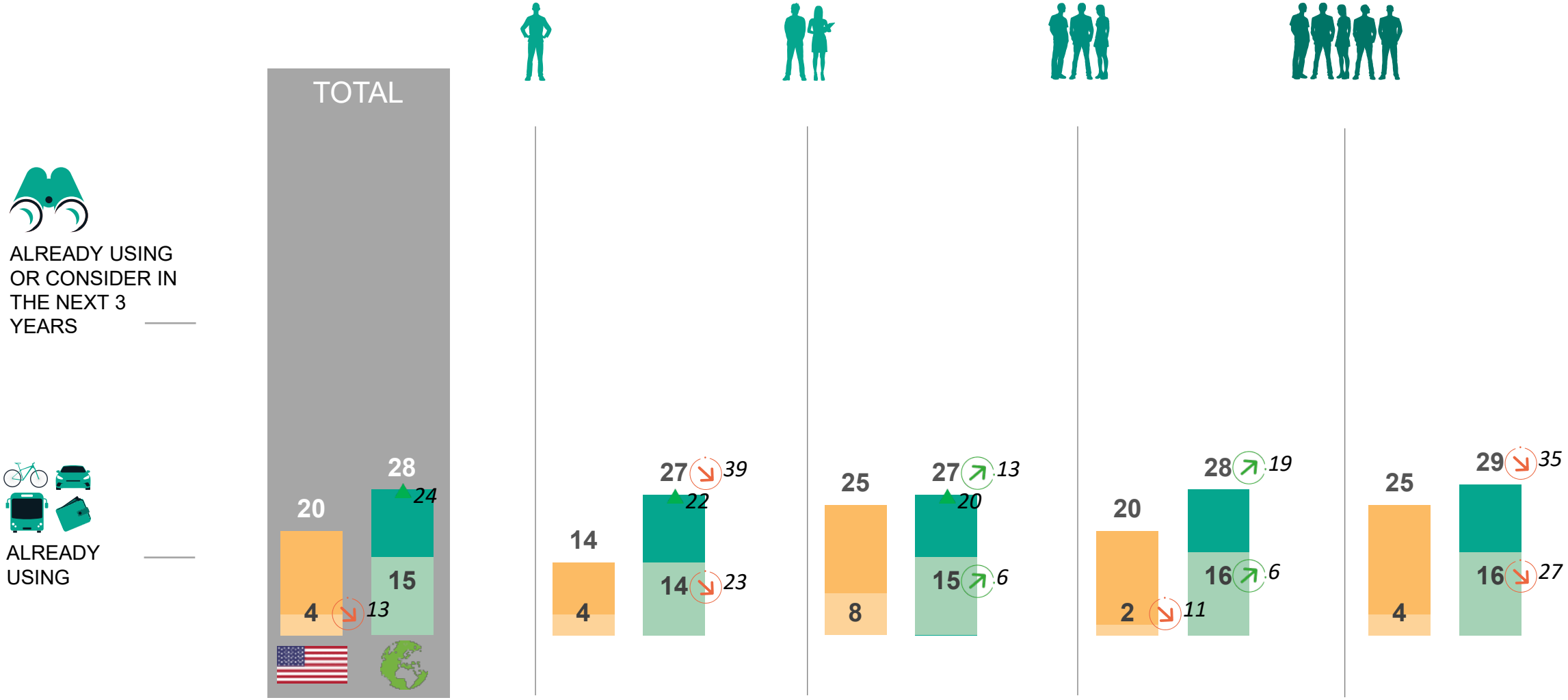


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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MOBILITY BUDGET IMPLEMENTATION

In %



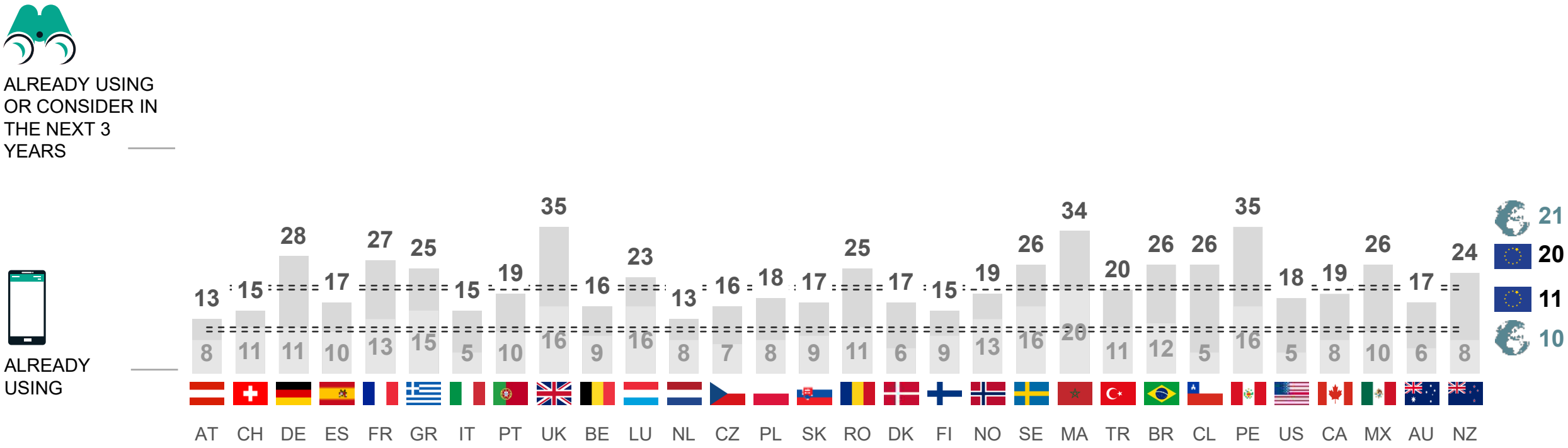
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

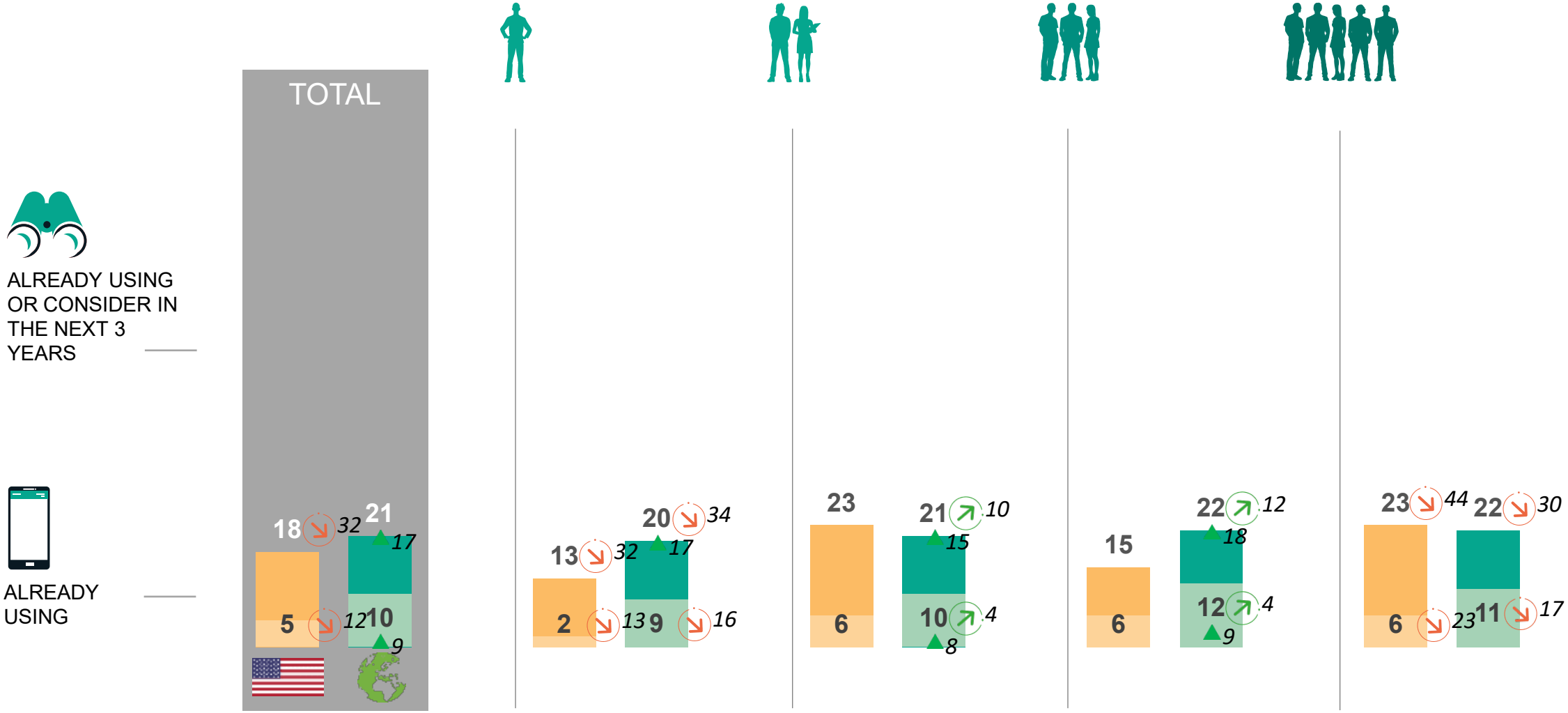
In %



Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %



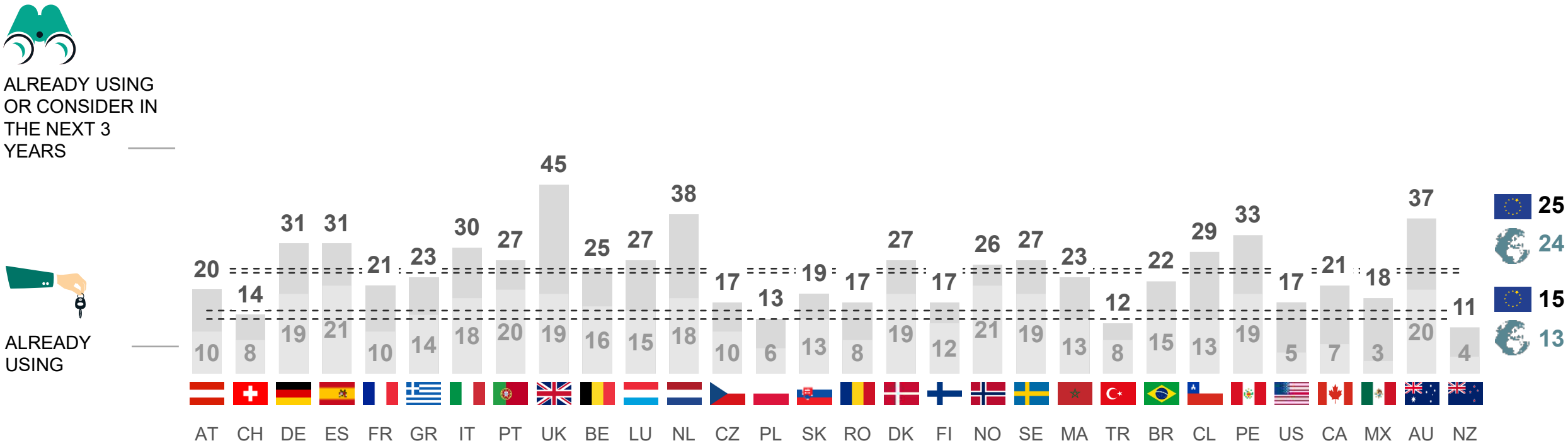
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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ELEMENT-ARVAL GLOBAL ALLIANCE

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %



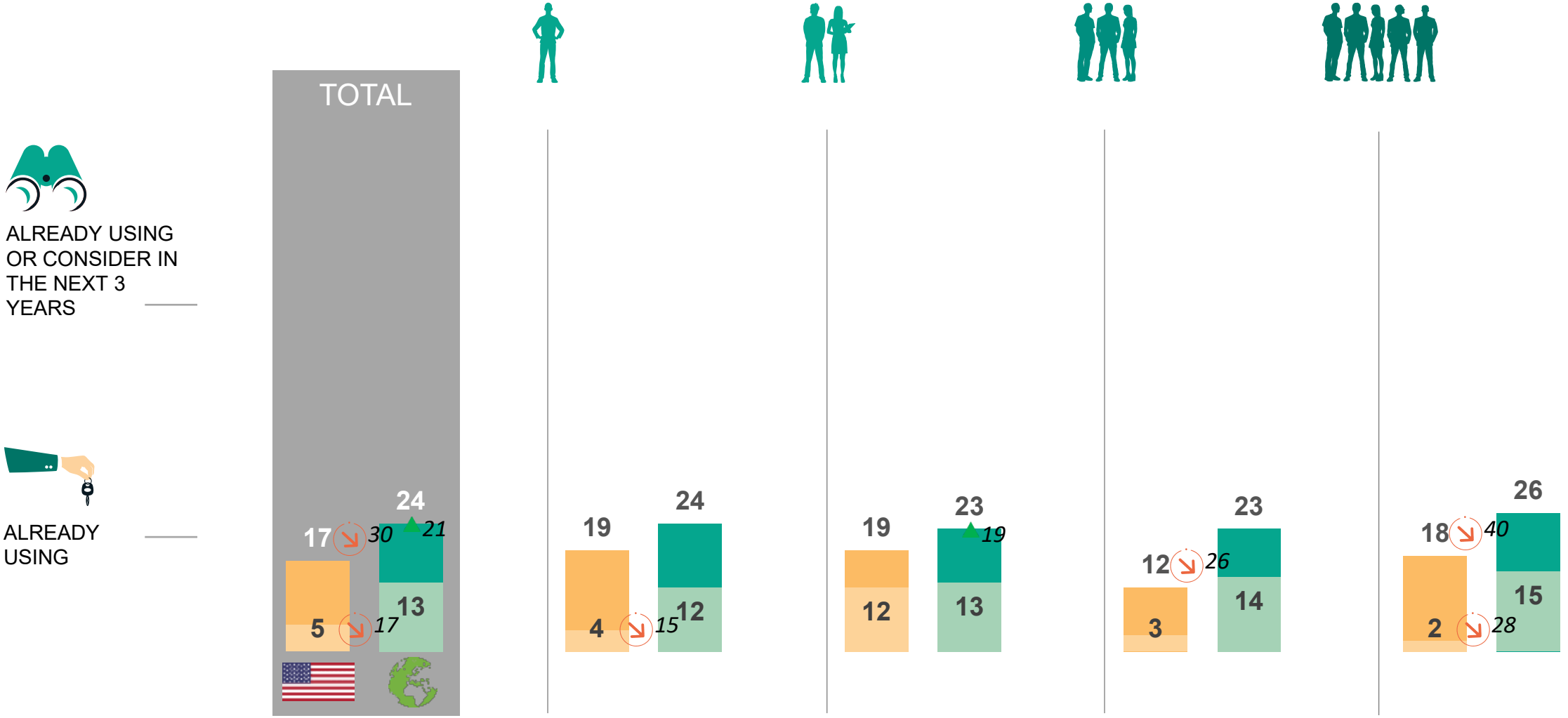
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %



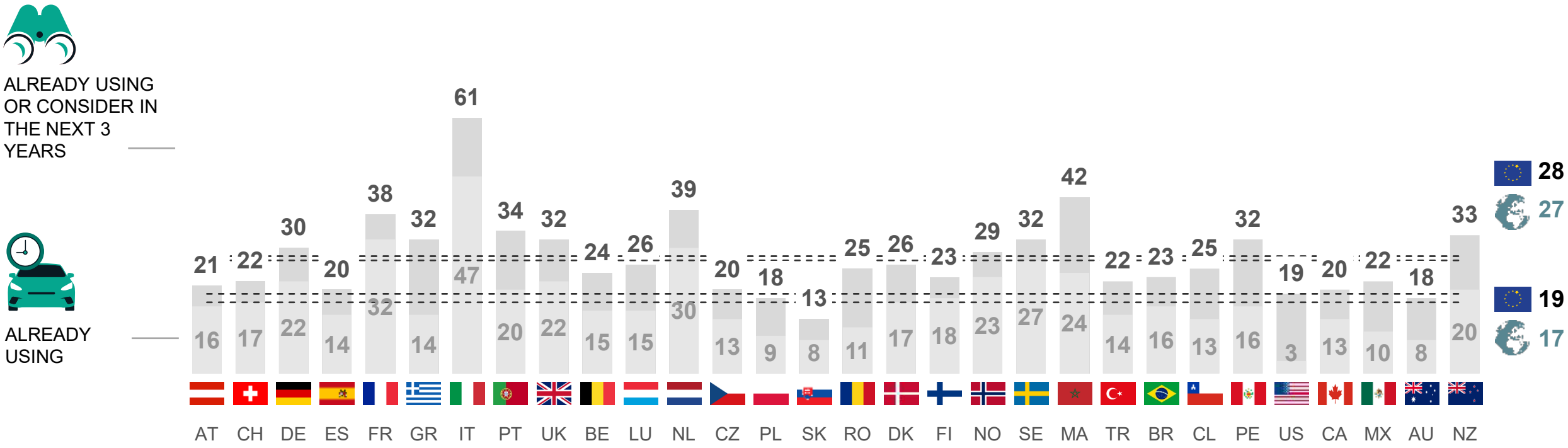
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %

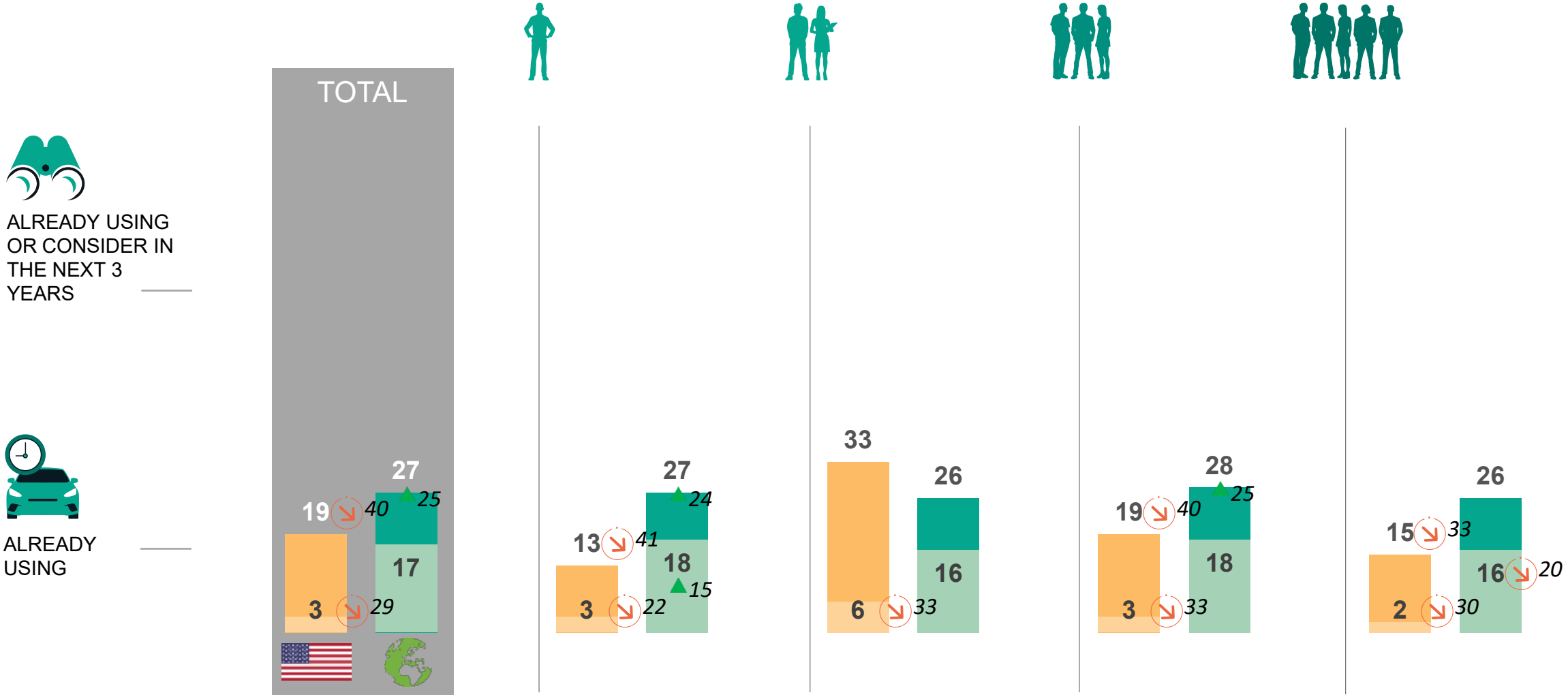


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %



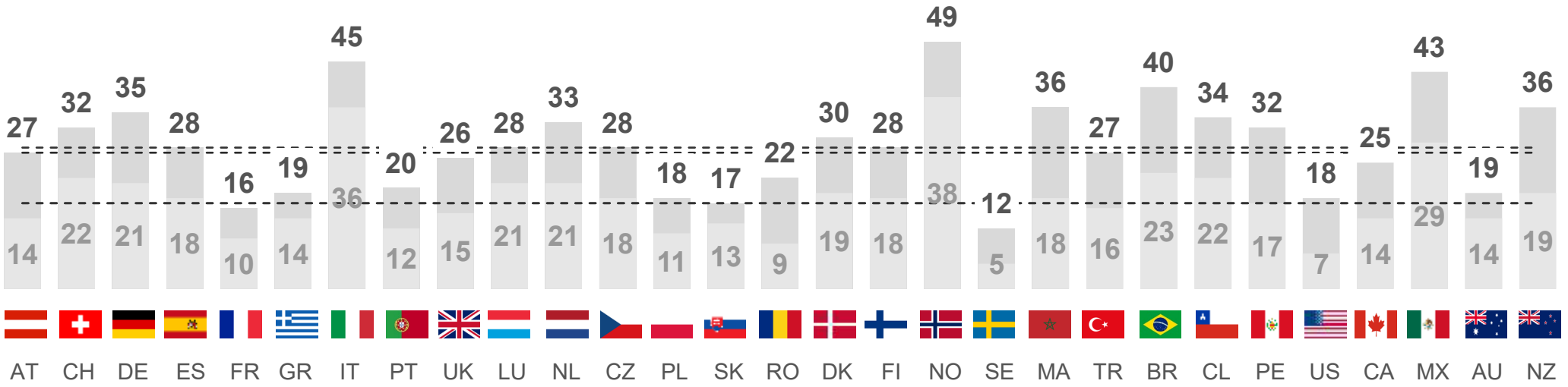
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

CAR OR CASH ALLOWANCE IMPLEMENTATION

In %

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

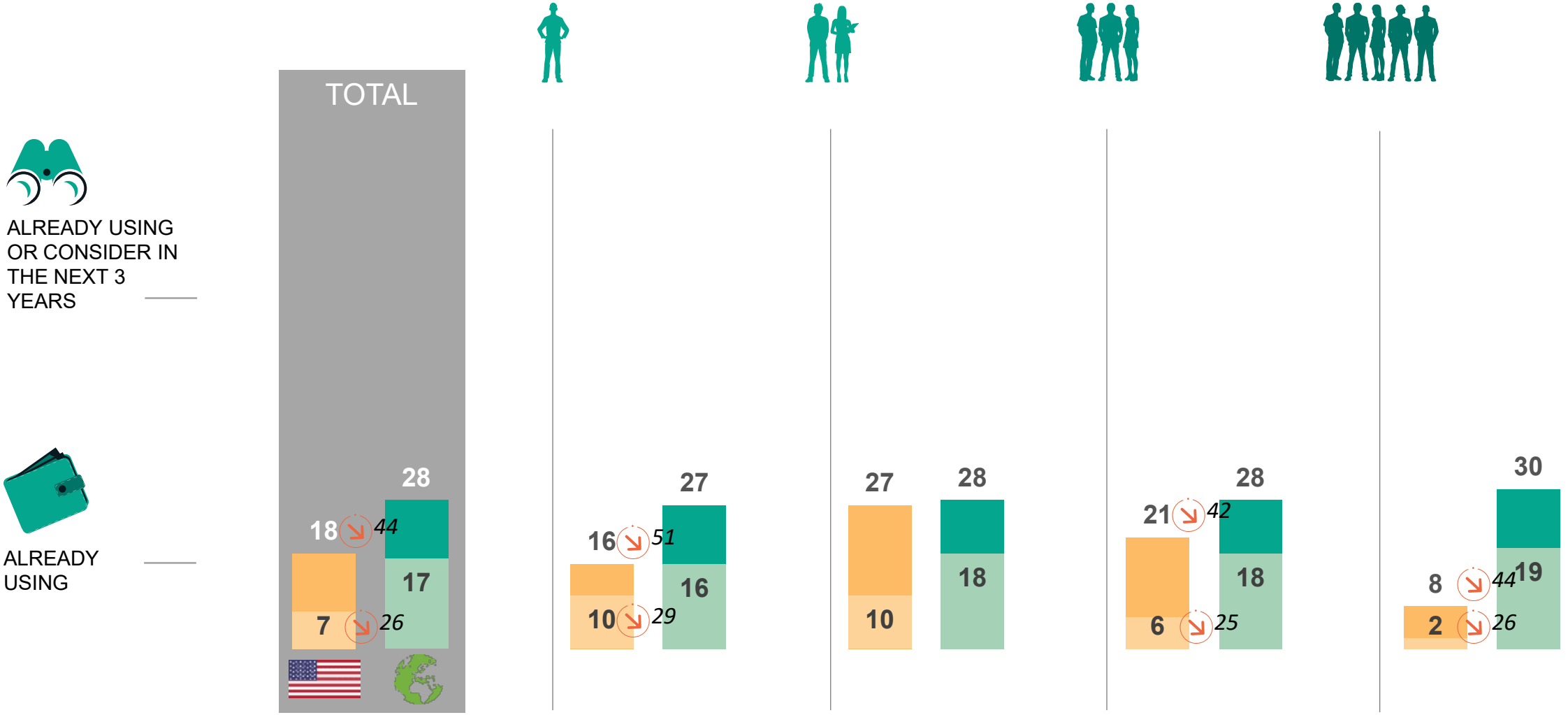
Arval Mobility Observatory

element | ARVAL BNP PARIBAS GROUP

ELEMENT-ARVAL GLOBAL ALLIANCE

CAR OR CASH ALLOWANCE IMPLEMENTATION

In %



Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



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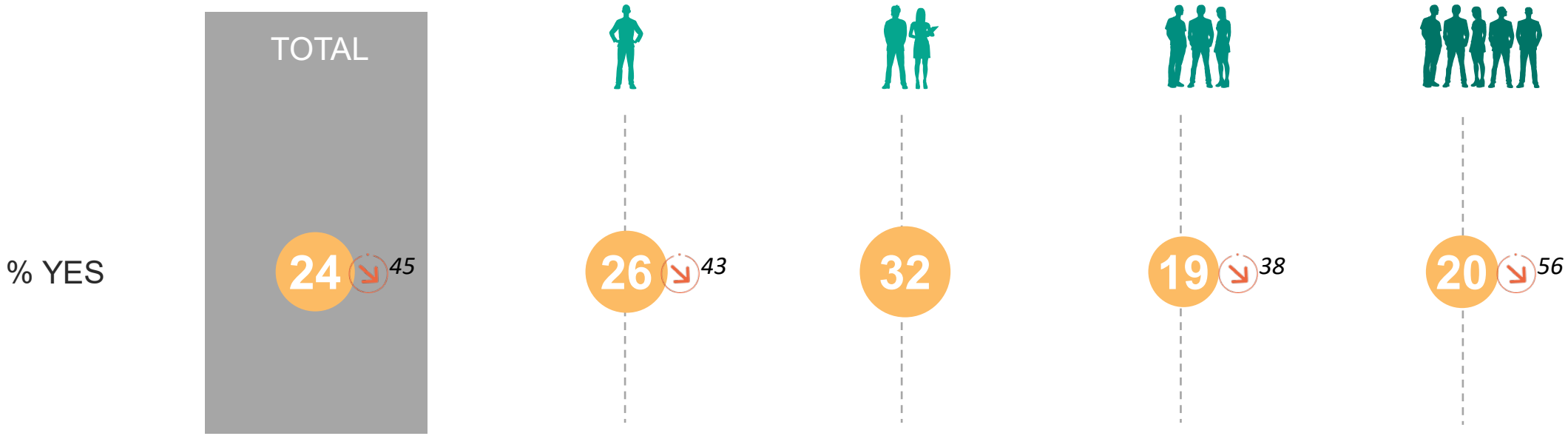
For what reasons has your company introduced or intends to introduce these mobility solutions?

Basis: companies introduced or intend to introduce at least one new mobility solution

Question asked to respondents that are aware of mobility solutions

MOBILITY AS A STRATEGIC FACTOR IN THE COMPANY

In %

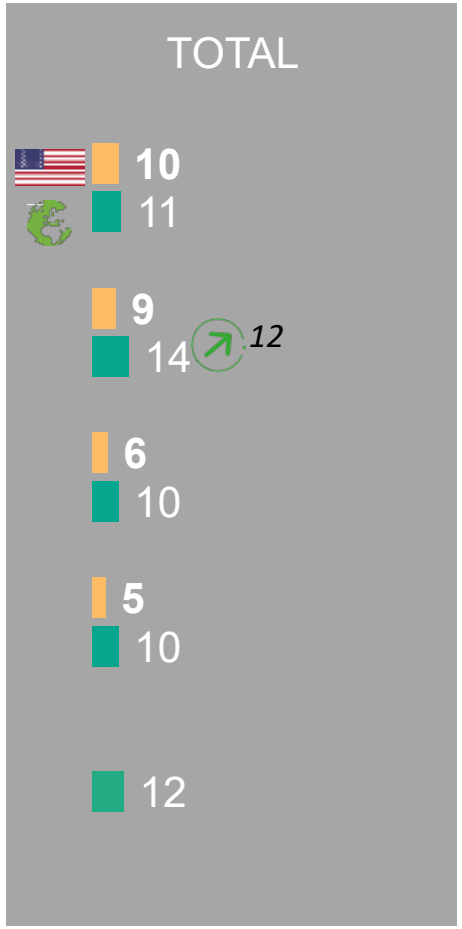


Is the mobility of all your employees a strategic factor in your company?
Basis: companies with corporate vehicles = 100%

LIKELIHOOD TO GIVE UP ALL / PART OF THE FLEET FOR MOBILITY SOLUTIONS

Certainly

In %





Private lease/Salary sacrifice	A short or mid term rental vehicle to provide transport for an employee	Mobility budget	Car sharing	Car or cash allowance
Low basis 11	*Low basis* 14	*Low basis* 10	*Low basis* 10	*Low basis* 11



Private lease/Salary sacrifice	A short or mid term rental vehicle to provide transport for an employee	Mobility budget	Car sharing	Car or cash allowance
Low basis 11	*Low basis* 15 12	*Low basis* 10	*Low basis* 10	*Low basis* 13

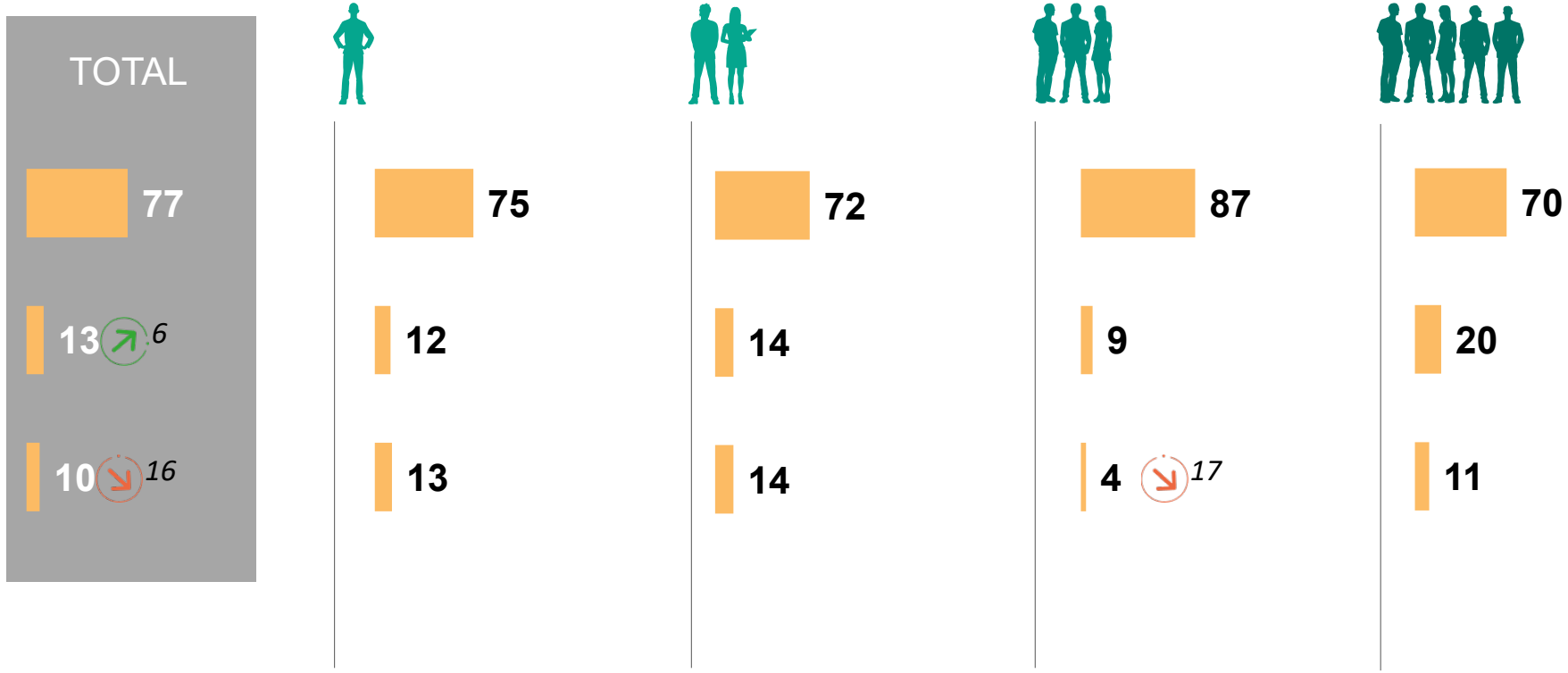
Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?
Basis: companies using or considering at least one mobility solution
Question asked to respondents that are aware of mobility solutions

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MAIN REASON TO PROVIDE COMPANY CARS TO EMPLOYEES

In %

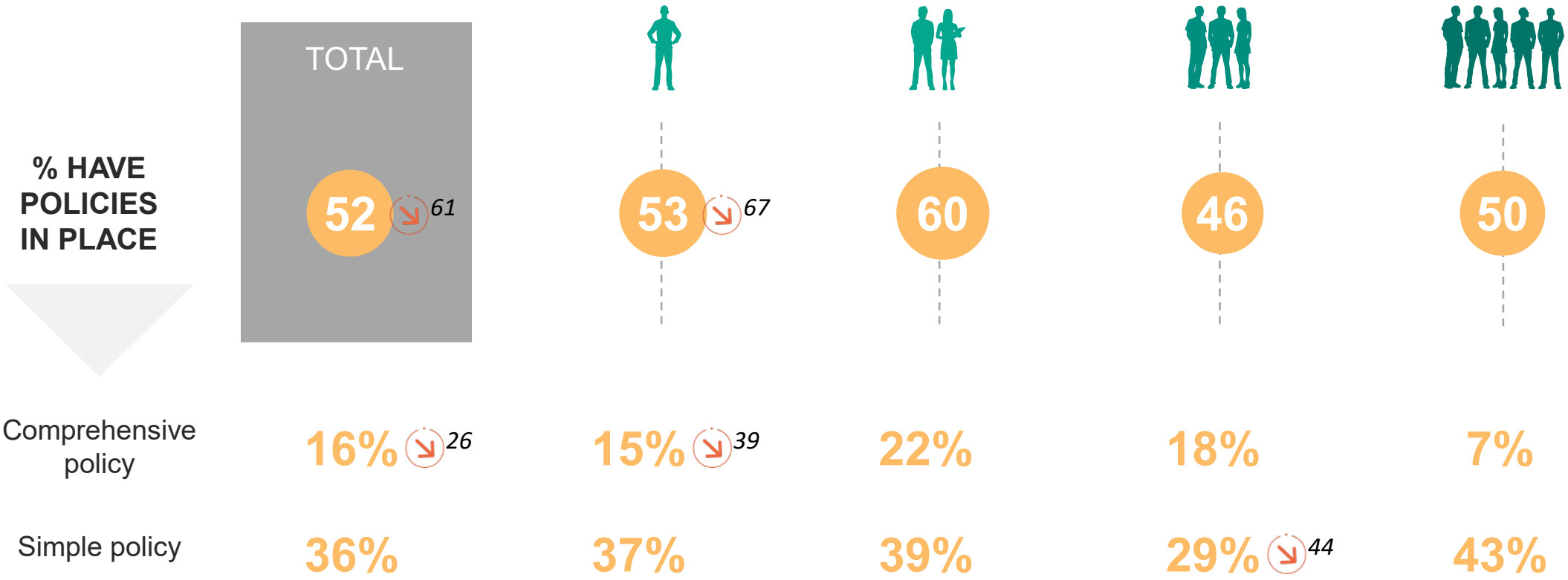
Passenger cars



What is the main reason why you provide company cars to your employees?
Basis: companies with passenger cars

POLICIES FOR PERSONAL CARS USED ON BUSINESS

In %



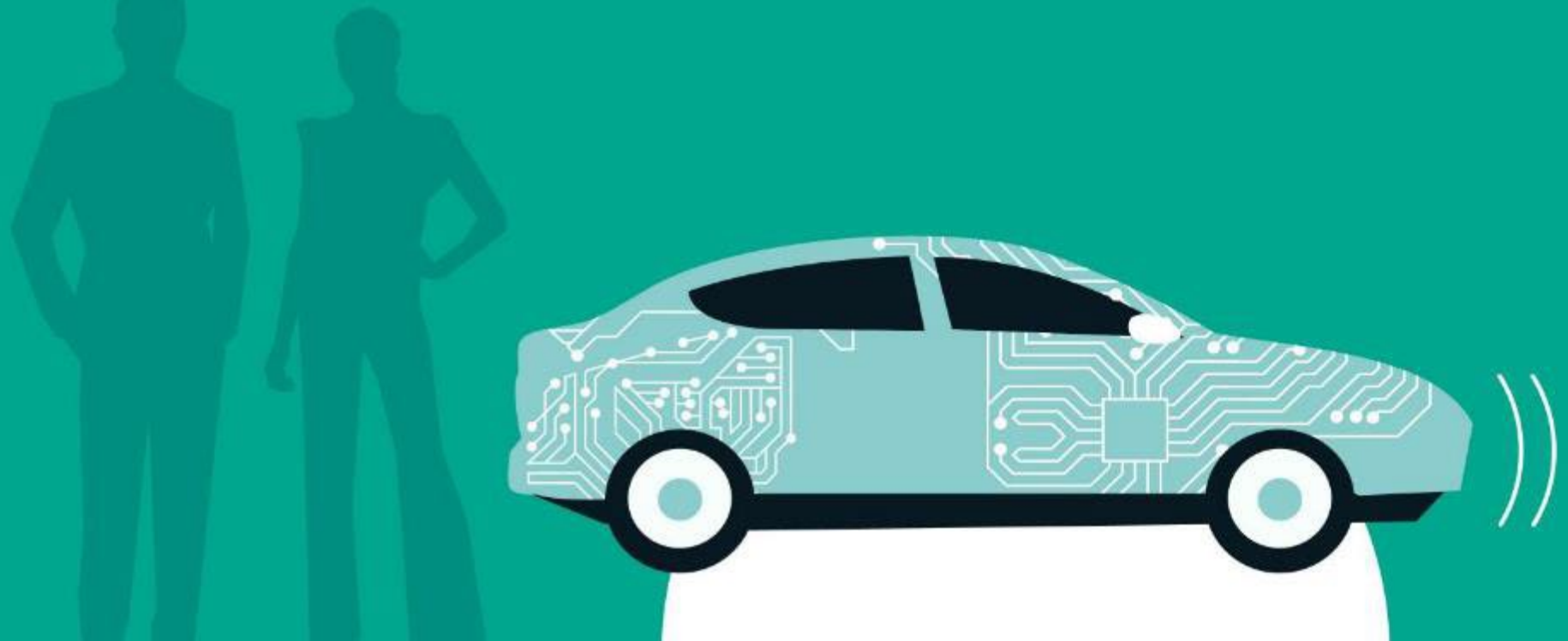
Do you have policies in place for cars that are owned by employees but used on business?
Basis: companies with corporate vehicles = 100%

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7

WHAT ARE THE USAGES IN TERMS OF CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY EQUIPMENTS?



A STILL SOMEHOW LIMITED USAGE OF CONNECTED VEHICLES

1. **1 out of 3 companies has a fleet using connected vehicles**, below the 40% global average. No major difference between passenger cars and light trucks.
2. **Less than 1 out 5 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years (below the 61% global average). Only a few are currently using the data.

CONNECTED VEHICLES



USE OF CONNECTED VEHICLES

33%

40%

USE OF TELEMATICS DATA

Already using

13%

16%



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

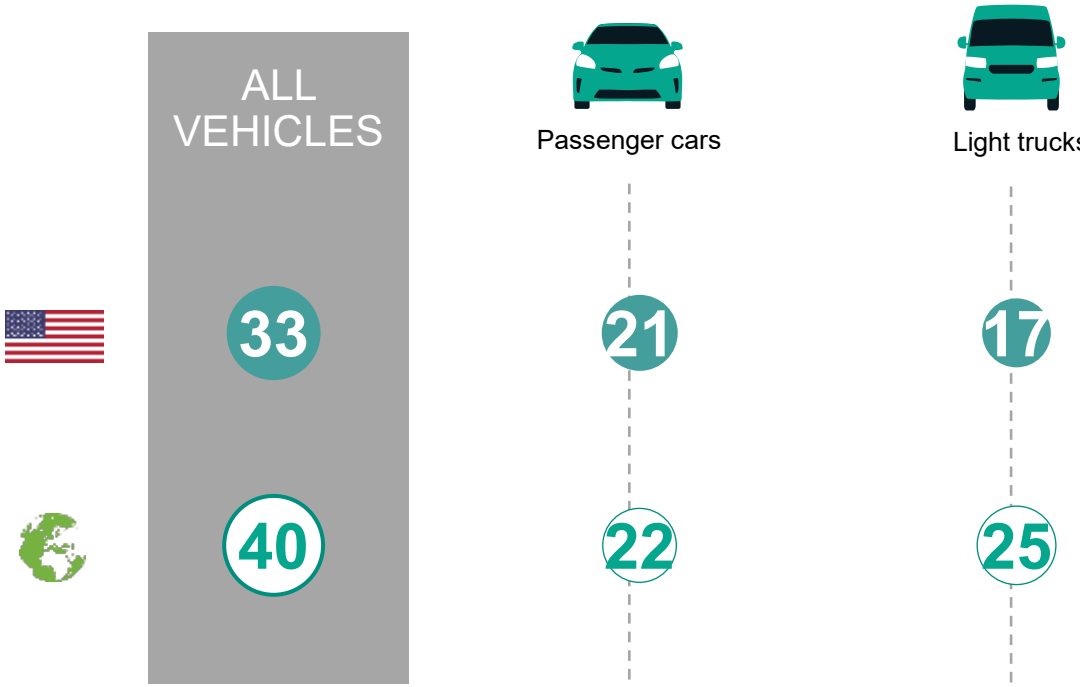
Passenger cars + Light trucks

NET OF YES: YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET

HOW TO READ THE RESULTS ?

33% of companies with fleet using connected vehicles for all or part of their fleet.

21% use connected vehicles for passenger cars, while 17% use connected vehicles for Light trucks.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of a car manufacturer box or by an after sales box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.
Basis: companies with corporate passenger cars / companies with corporate Light trucks

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

Passenger cars + Light trucks

NET OF YES: YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of a car manufacturer box or by an after sales box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.
Basis: companies with corporate passenger cars / companies with corporate Light trucks

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

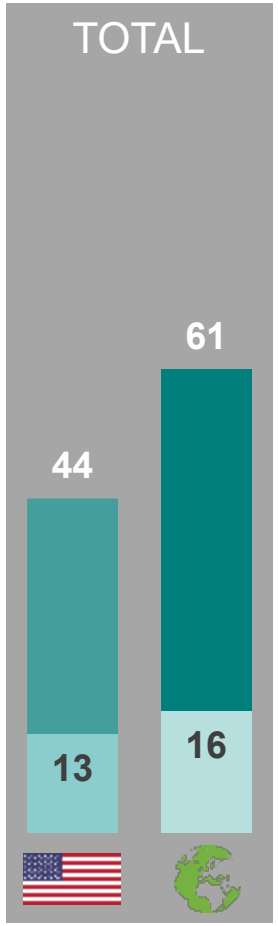
All vehicles

In %

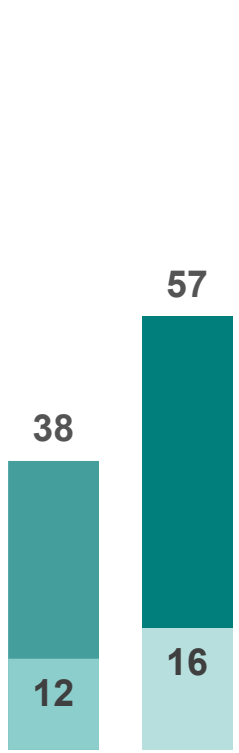
Passenger cars + Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Passenger cars



Light trucks



HOW TO READ THE RESULTS ?

44% of the companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform in the next 3 years.
13% of companies are currently using the data.

New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

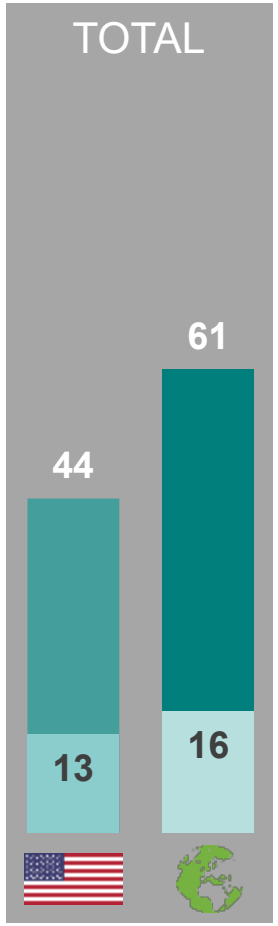
All vehicles

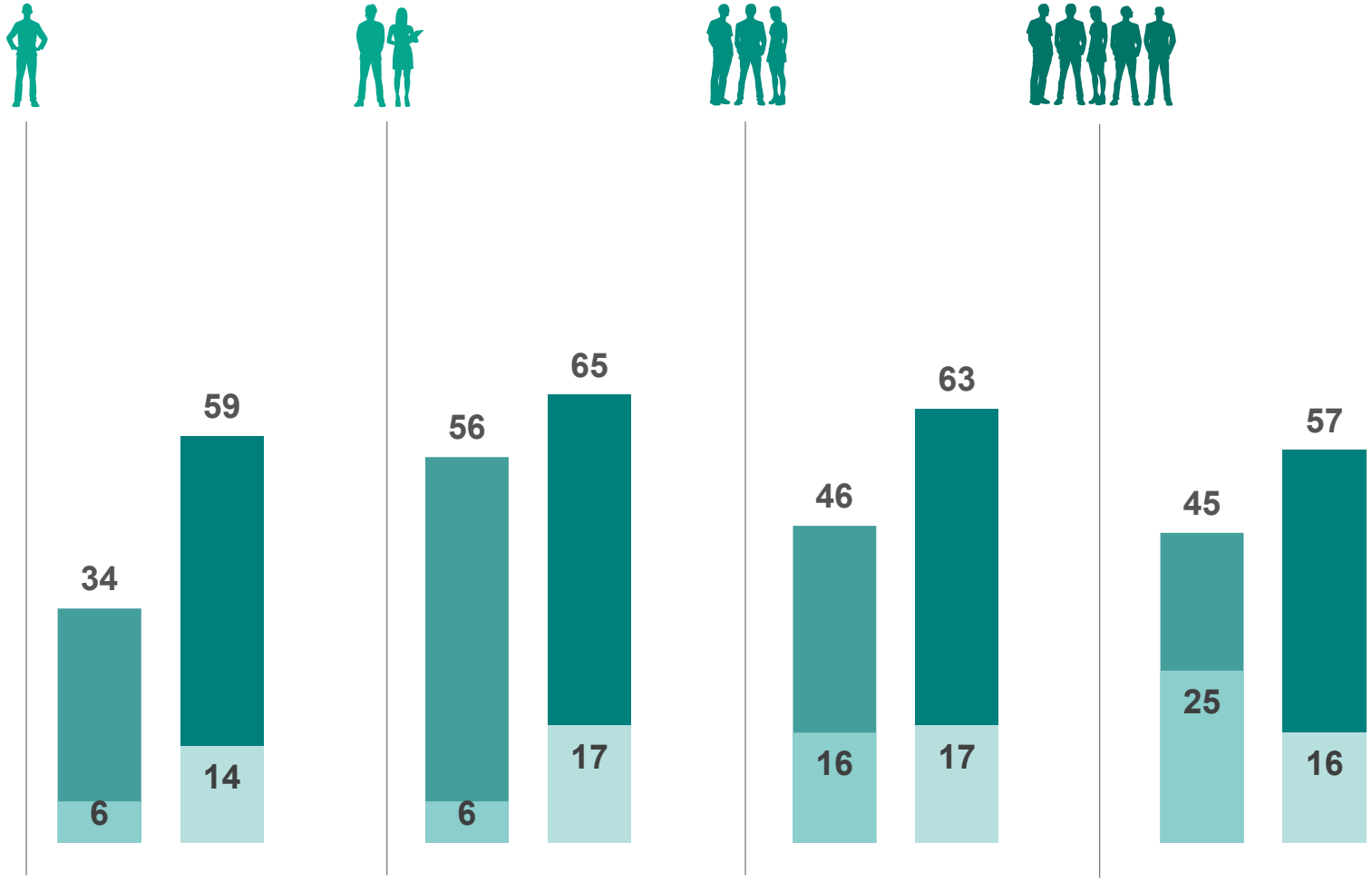
In %

Passenger cars + Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING





New question added in 2024

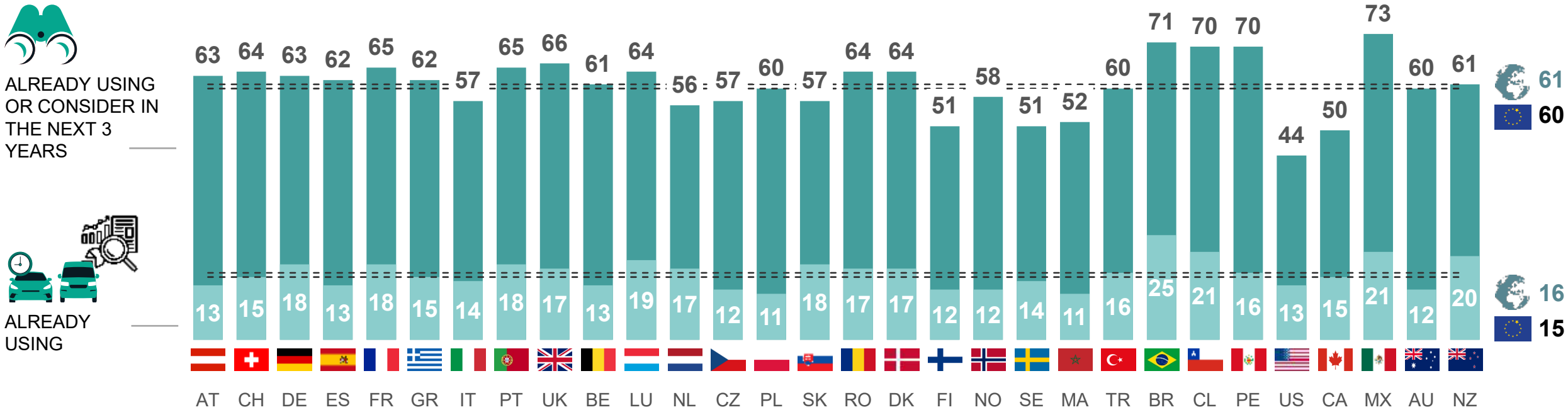
Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %

Passenger cars + Light trucks



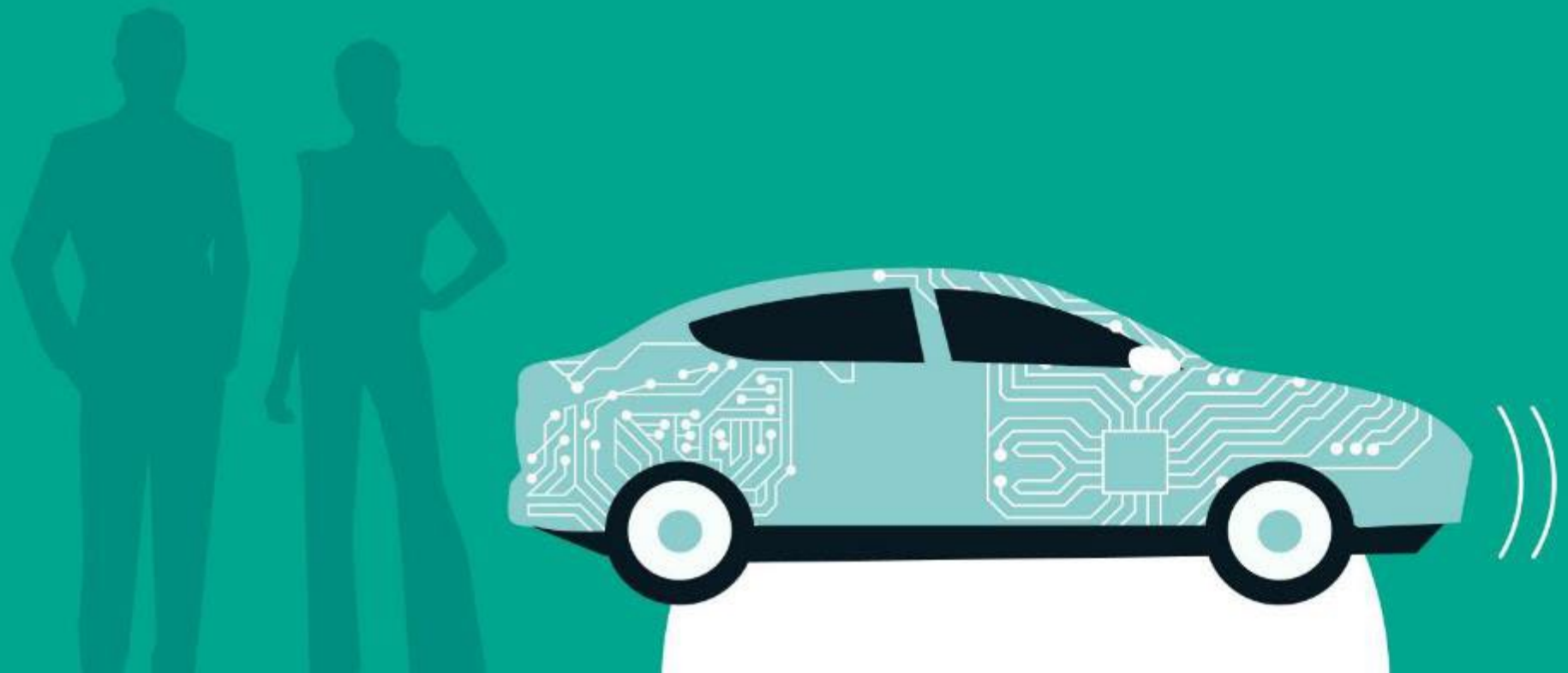
New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



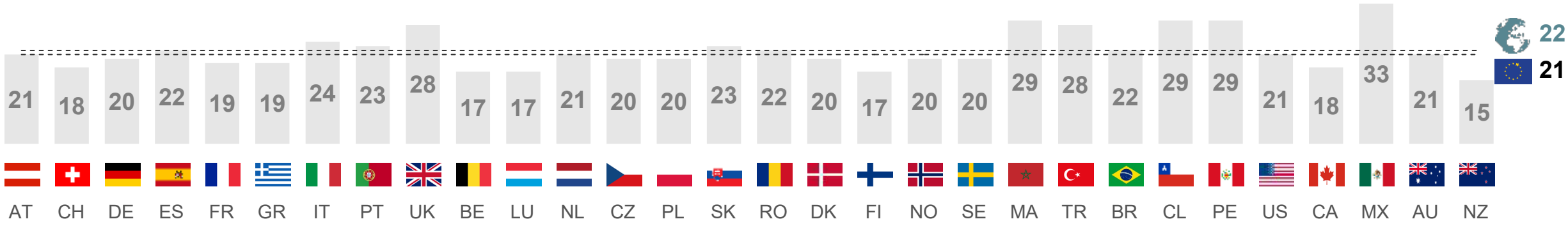
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

In %

Passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR PASSENGER CARS



Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

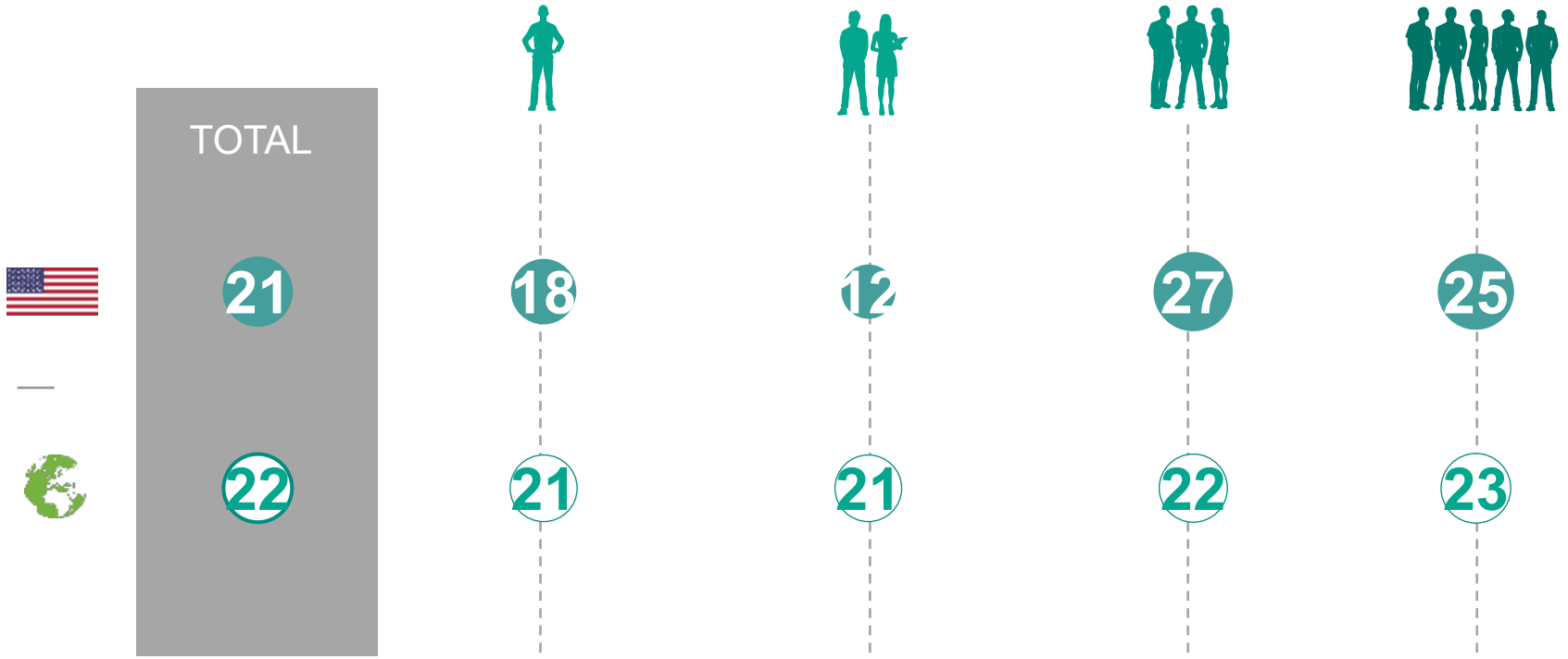
In %

Passenger cars

NET OF YES: YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET

HOW TO READ THE RESULTS ?

21% use connected vehicles for passenger cars.



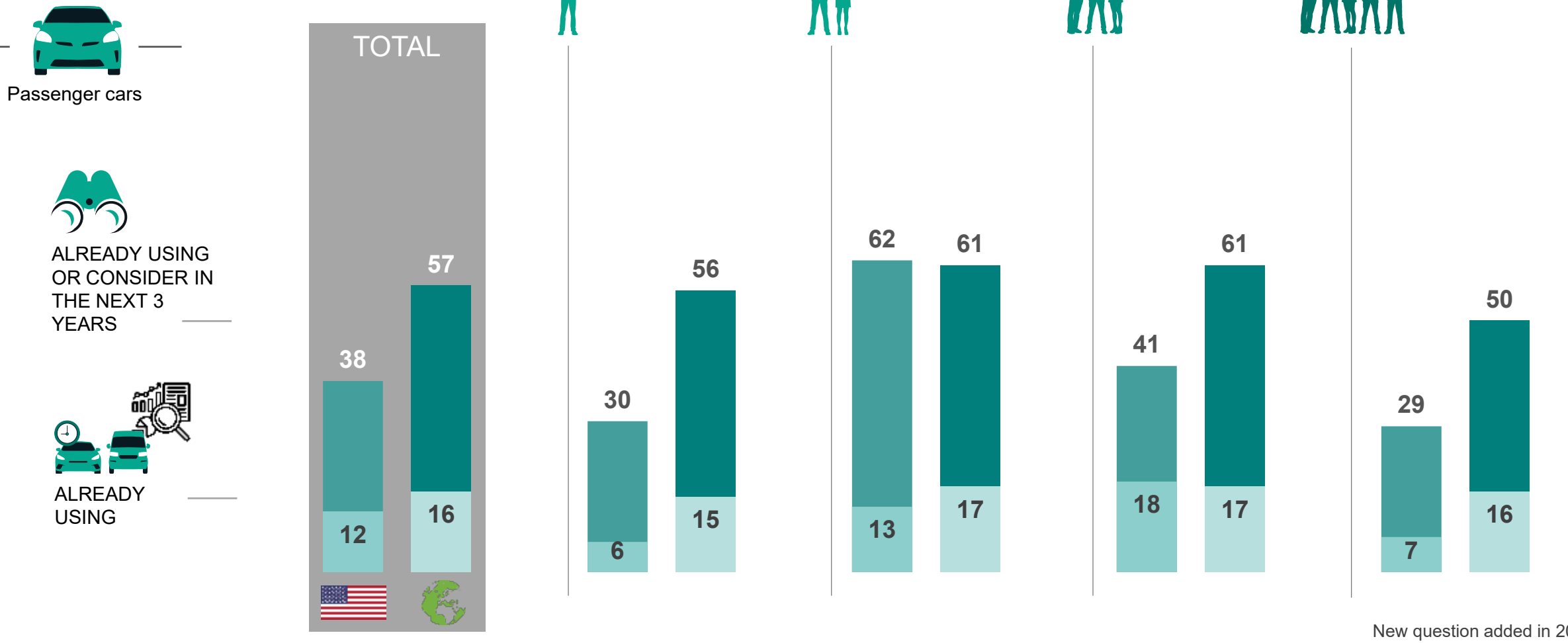
Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?
Basis: companies with at least one passenger car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

Passenger cars

In %



New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their passenger cars.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

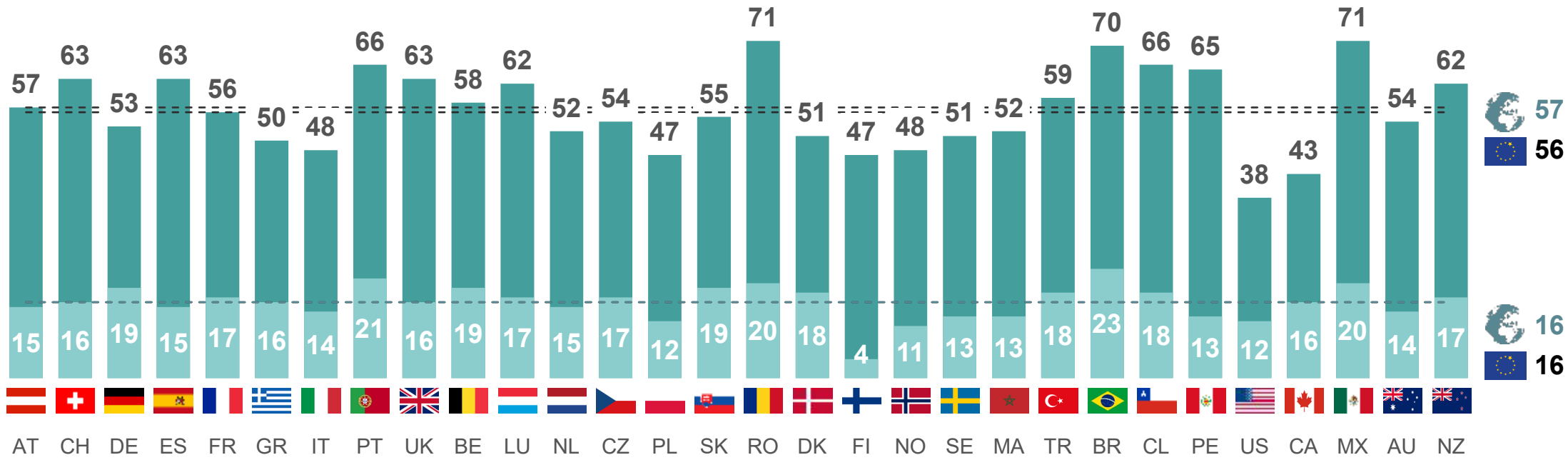
Passenger cars

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



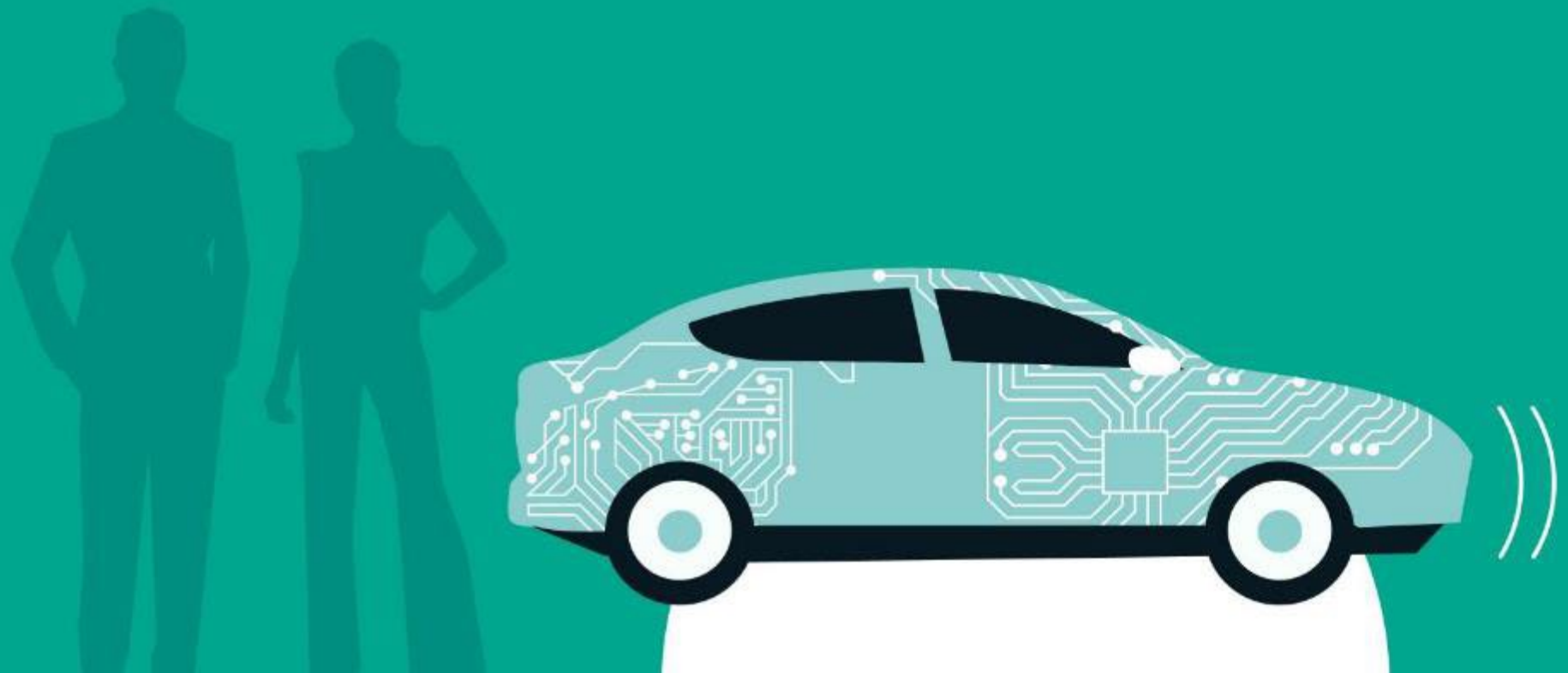
New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their passenger cars.

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. Light trucks



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

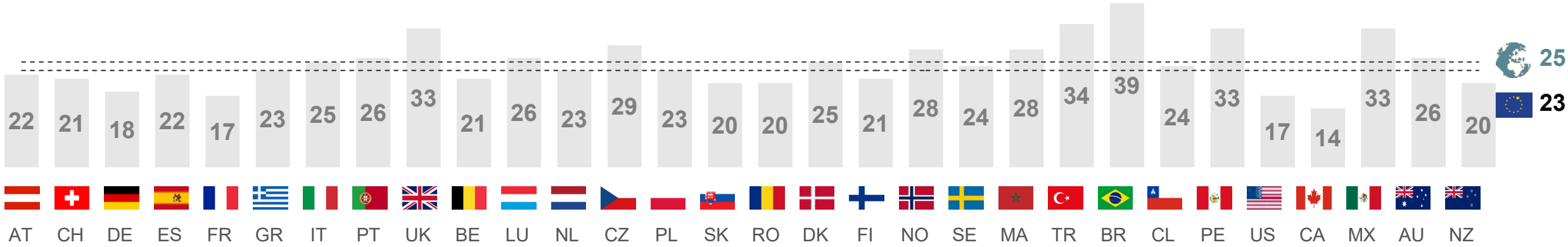
Light trucks

In %



Light trucks

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR Light trucks



Is your fleet connected thanks to a telematic tool?
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.
Basis: companies with corporate passenger cars / companies with corporate Light trucks

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Light trucks

In %

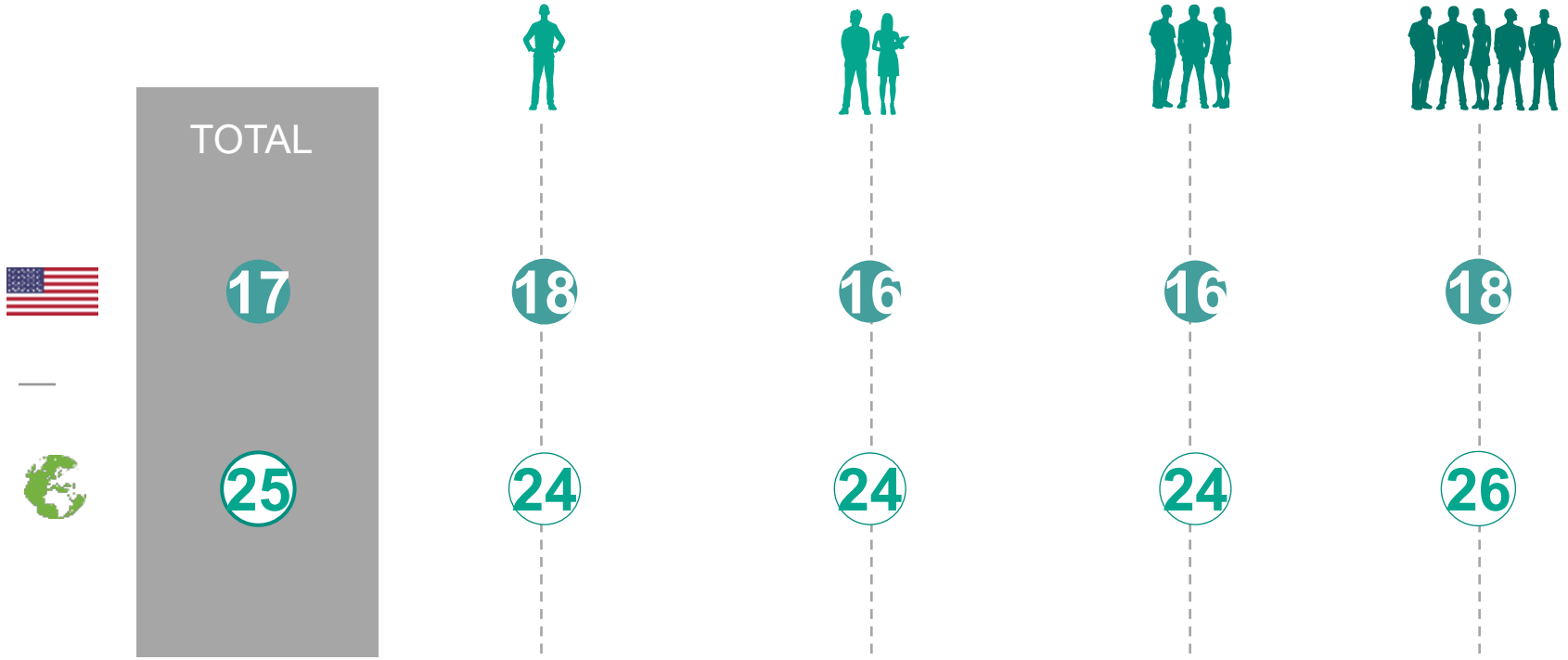


Light trucks

NET OF YES: YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET

HOW TO READ THE RESULTS ?

17% use connected vehicles for Light trucks.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with at least one Light trucks car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

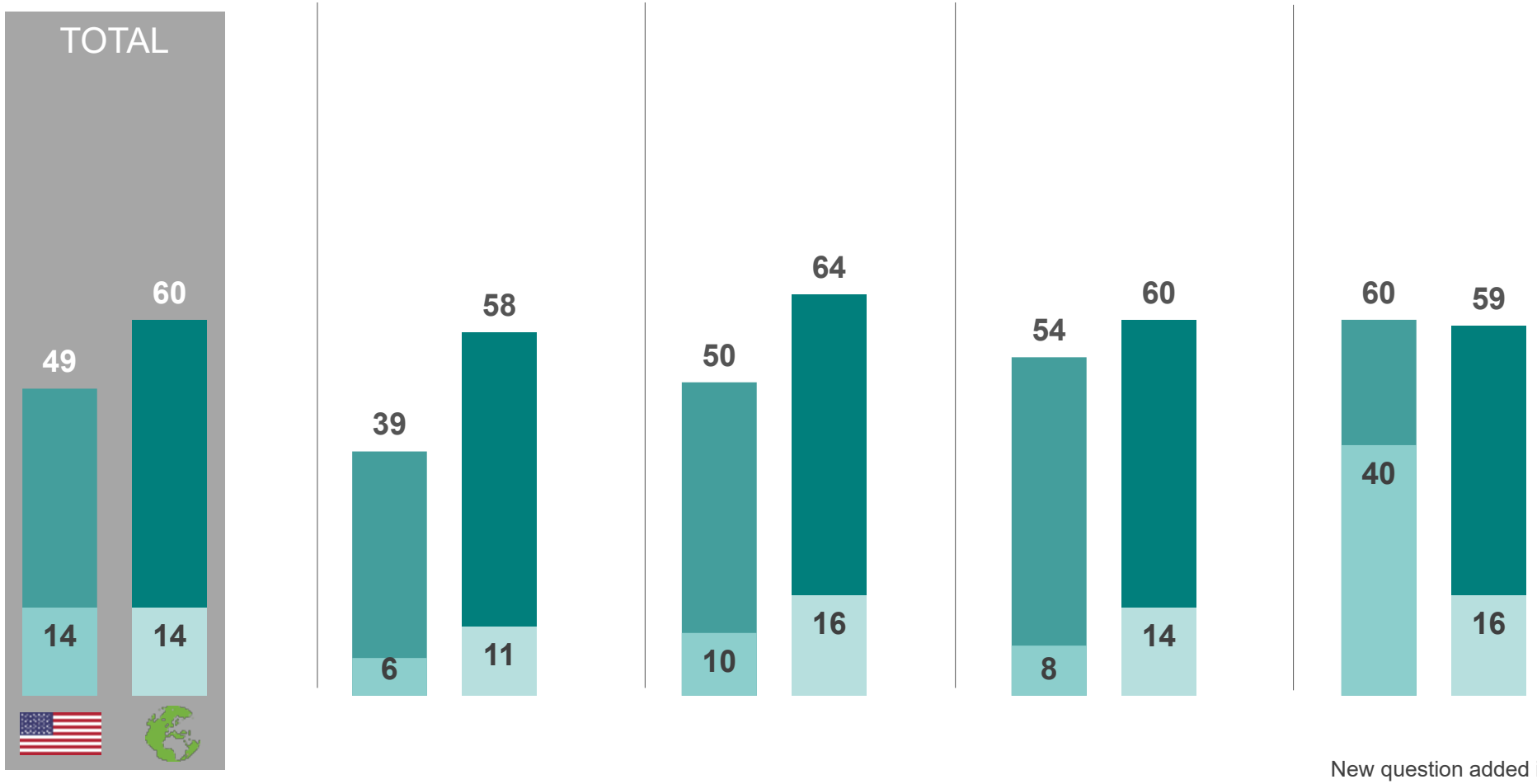
Light trucks

In %

Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a LVCs fleet using connected vehicles for all or part of their Light trucks.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

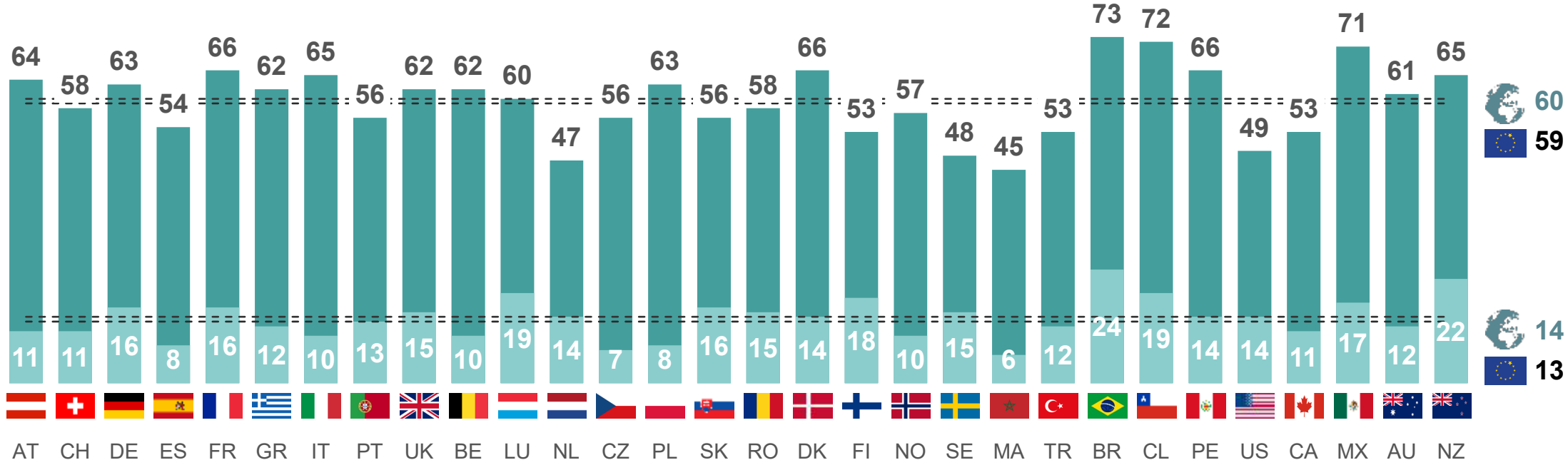
Light trucks

In %

Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



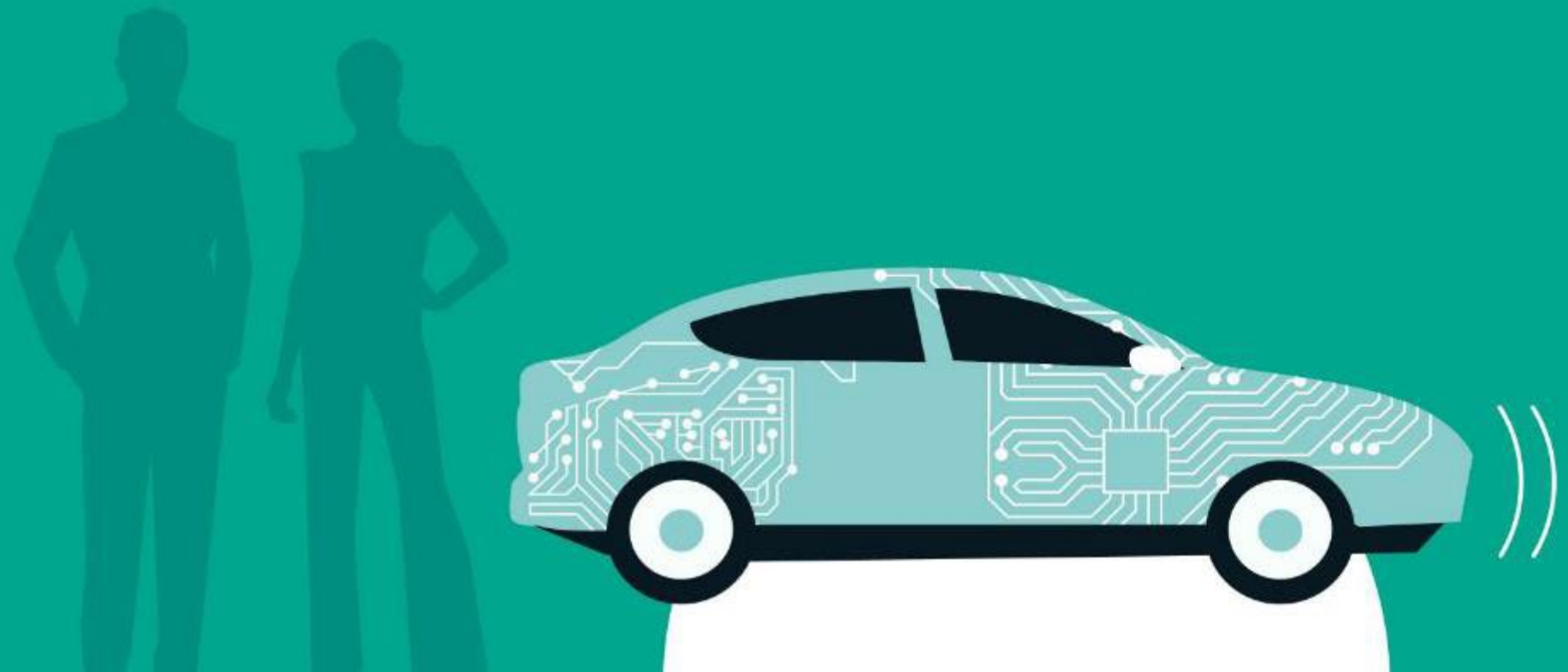
New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their Light trucks.

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

D. ADVANCED DRIVING ASSISTANCE SYSTEMS



MOST USEFUL “ADVANCED DRIVING ASSISTANCE SYSTEMS” TO IMPROVE DRIVER SAFETY

In %

Passenger cars + Light trucks



	TOTAL				
Lane departure warning system	36	32	37	40	36
Automatic Parking Systems	32	33	34	29	32
Collision Avoidance or warning systems	31	29	38	32	23
Automatic emergency braking system	30	33	24	35	23
Driver Fatigue warning	30	34	25	33	23
Adaptive Cruise Control	29	28	28	24	40
Pedestrian detection system	18	12	21	16	25
Don’t know	*1*	*0*	*3*	*0*	*2*

Which of the following 'Advanced Driving Assistance Systems' do you feel are the most useful to be fitted to a company car to improve driver safety?
Basis: companies with corporate vehicles = 100%


Arval Mobility Observatory
element
ARVAL
BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

Thank you


Ipsos